

# From *Insight* *to Impact*

Redefining FMCG Execution

07 | 10 | 26

NIQ



# AGENDA

A curated morning of insight, connection and action



10:10 am – 10:40 am

**Winning in Turbulent Times : FMCG perspective**



10:40 am – 11:20 am

**Precision Targeting for Efficient Distribution**



11:20 am – 11:45 am

**Coffee Break**



11:45 am – 12:15 pm

**Panel : Winning FMCG Growth in a Changing Market: Where Should Leaders Place Their Bets**



12:15 pm – 01:15 pm

**Unlocking Hidden Growth with the Right Execution**



01:15 pm Onwards

**Lunch**

# Winning in Turbulent Times

**Presenter: Preeta Sanjith**  
**SMB, India Leader**



# 1. The tale as old as time!!! India Shining



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# India Shining is a reality today

Winning in India means winning across multiple Indias

## 01 Strong economy

Scale and momentum

## 02 Digital acceleration

Frictionless access

## 03 Young population

A large future consumer base

## 04 Wider income ladder

More segments, more occasions

## 05 Cultural diversity

Many needs and micro-markets

## 06 Infrastructure growth

Distance to demand is shrinking



CONNECTED • ACCESSIBLE • ASPIRATIONAL

IMPLICATION

One national ambition. Multiple local plays.

# There is no single “Indian consumer”

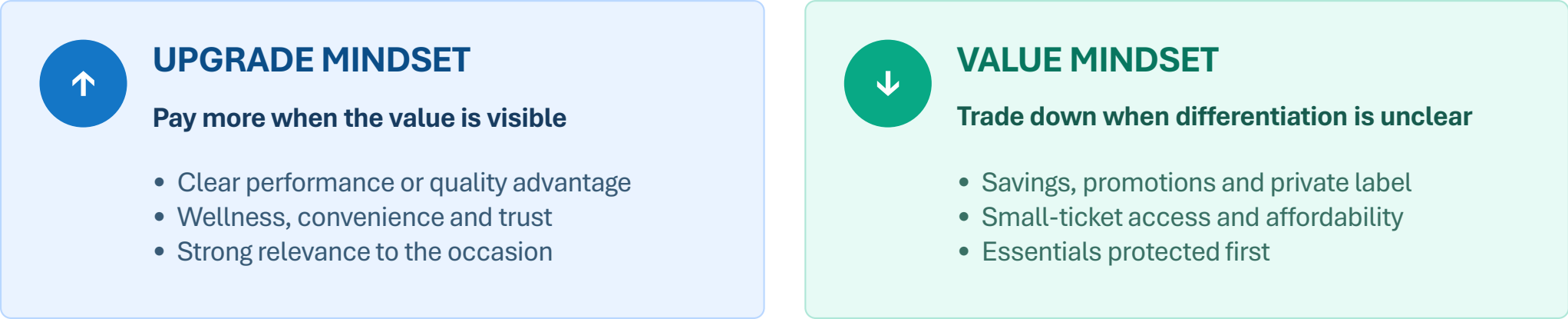
Premium aspirations and severe affordability constraints coexist, often within the same geography and shopping basket

## HOUSEHOLD LANDSCAPE



## ONE CONSUMER. TWO MINDSETS.

## SWITCHES BY CATEGORY



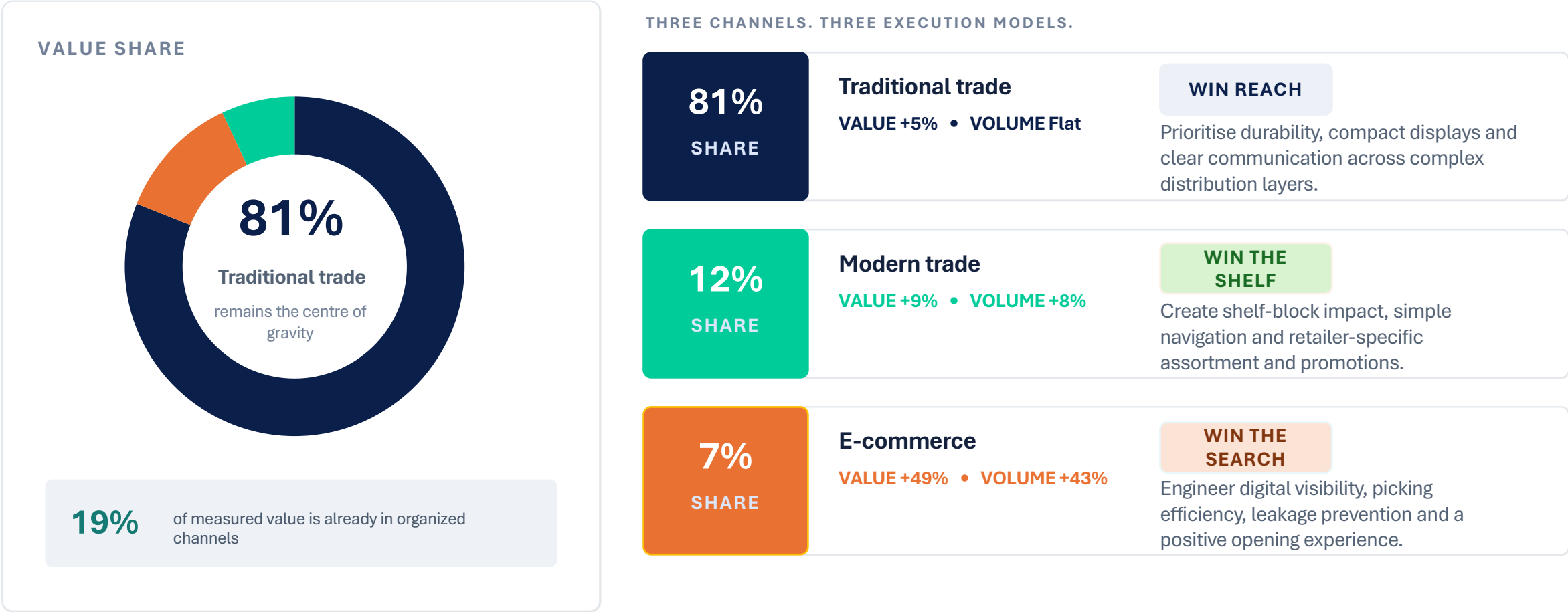
## IMPLICATION

Win the occasion, not the demographic: make premium value obvious and value options easy to access.

Source and household estimates: [Blume Ventures](#), [Indus Valley Annual Report 2025](#). Segment names have been editorially reframed for neutral client use; they are a market heuristic, not official socioeconomic classifications.

# The shelf is not one place

Traditional trade owns the scale. Organized channels are setting the growth pace.



**IMPLICATION** Do not copy-paste execution across channels: design a distinct pack, message and visibility system for each shelf.

Source: NielsenIQ India FMCG Quarterly Snapshot, Q2 2026. 72 like-for-like categories; e-commerce co-operators only.

## 2. Something suddenly shifts!!!

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# Multi-Front Squeeze: Fuel Shock Up, Consumer Confidence Down

Rising input costs, disrupted replenishment and weaker income expectations are compressing rural consumption & confidence

1. Fuel, Packaging and Freight pressure increased

9.87%

WPI | Jun'26

4.38%

CPI | Jun'26

Crude breached \$100/bbl

Fuel, packaging and freight costs surged; the WPI-CPI gap signals producer pressure not yet fully passed through.

2. Rainfall and sowing disruptions affected rural income expectations

June rainfall deficit

40% below normal

Delayed sowing + fertilizer Inflation

→ High Cost & Low Income

Source: DPIIT WPI; MoSPI CPI & PLFS; RBI CCI; IMD;

3. Mobility and replenishment challenges

YoY growth (%)

Consumption of petroleum products

Toll Collection

12.7

4.8

-6.5

-7.2

Both indicators deteriorated in Apr-May

Fuel availability/usage & toll collections point towards disrupted vehicle movement & last-mile replenishment, especially outside cities.

4. Consumer confidence fell

Consumer Confidence Index (100 = neutral)

Urban

Rural

Lowest Consumer Confidence Index Level Post COVID

5.1%

Rural unemployment

-0.6pp

LFPR | Apr-May

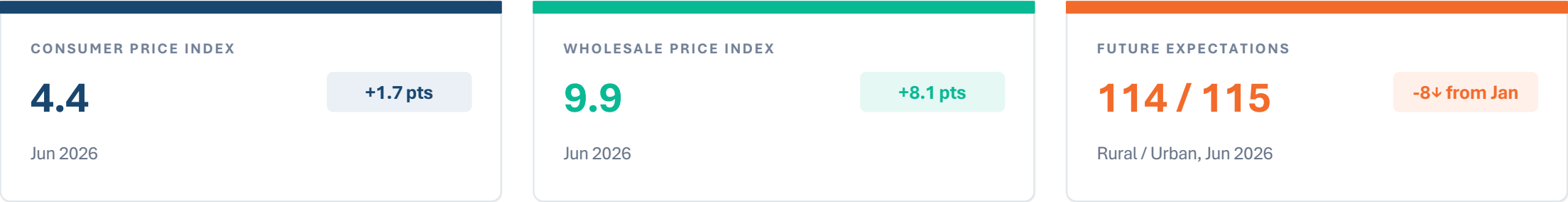
-0.8pp

WPR | Apr-May

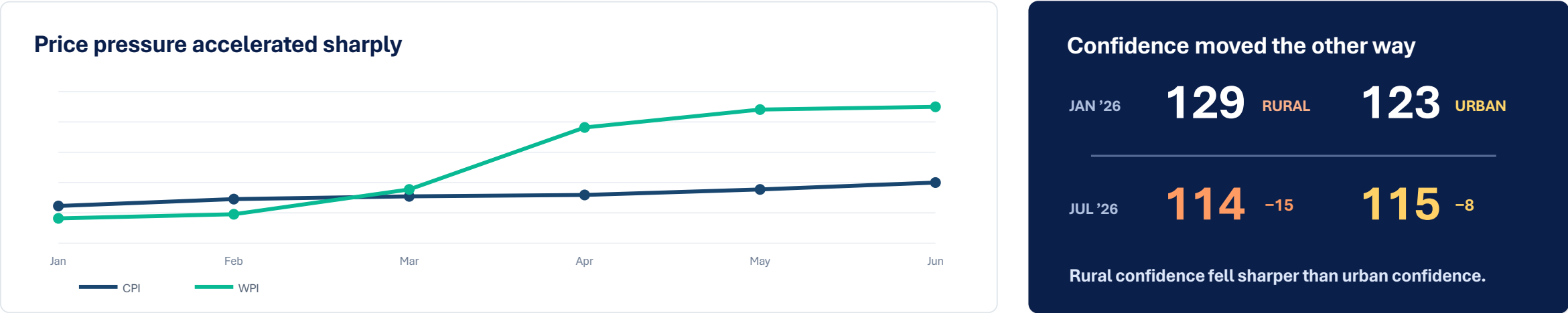
IMPLICATION Higher input costs + weaker distribution + falling confidence & work participation ➡ FMCG volume slowdown, sharper in rural

# Macro pressure is creating cost-income confidence squeeze

Inflation is rising faster than confidence



## THE SQUEEZE IN ONE VIEW

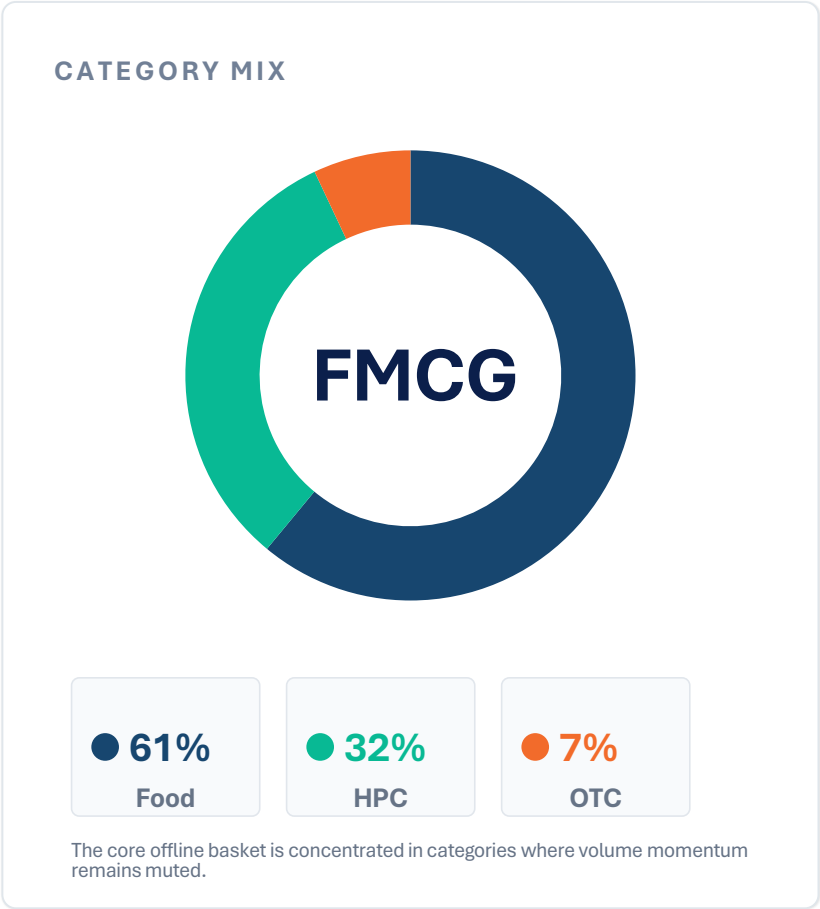


IMPLICATION

Protect affordability now: sharpen price ladders, smaller packs and value communication before confidence weakens further.

# Offline demand for Foods and HPC remains subdued

Food and home & personal care represent 93% of the mix, yet both delivered only 1% volume growth over 2 years



2-YEAR CAGR TO AMJ '26

|      |              | PRICE | VOLUME | VALUE |
|------|--------------|-------|--------|-------|
| FMCG | Total market | 5%    | 1%     | 6%    |
| Food | 61% of mix   | 6%    | 1%     | 7%    |
| HPC  | 32% of mix   | 3%    | 1%     | 3%    |
| OTC  | 7% of mix    | -2%   | 7%     | 5%    |

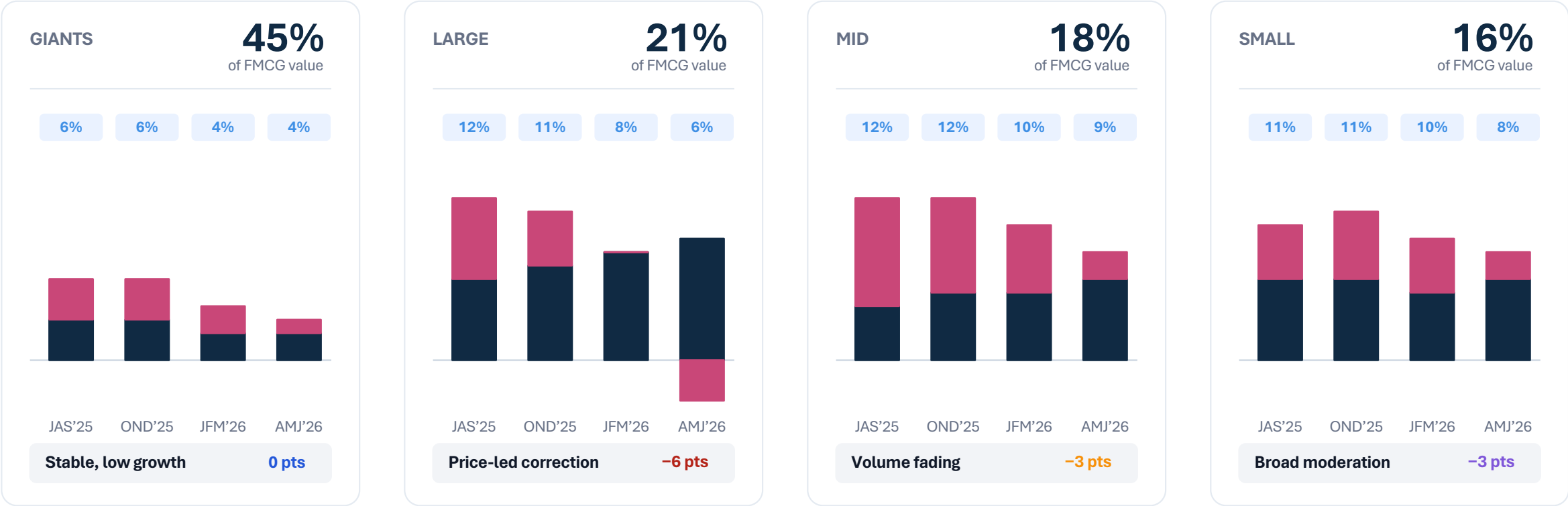
Food and HPC growth is almost entirely price-driven. OTC is the exception, with volume at +7%.

**IMPLICATION**    Rebuild offline volume through sharper price-pack architecture, visible value and category-specific activation.

# Growth is slowing across every manufacturer tier

Cost pressure is increasingly shifting growth from volume to price, especially among Large manufacturers

Large manufacturers are now fully price-led: 9% price growth is offset by -3% volume, bringing value growth down to 6%.



HOW TO READ

- Price growth
- Volume growth
- Value growth

Labels shown on AMJ'26 bars; blue markers show reported value CAGR.

**IMPLICATION** Prioritize volume recovery and pack-price architecture, not price increases alone.

# However, in recent quarter, non-giants Led Decline In Majority Of States

High inflation in Edible Oils and Laundry observe major change

56%

FMCG volume contribution from Non-Giants

88%

of FMCG volume decline led by Non-Giants

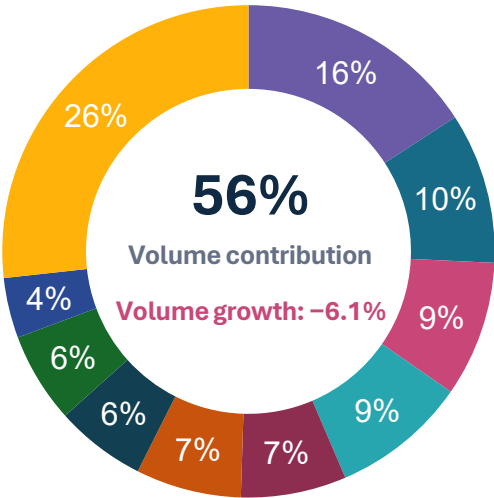
6×

faster decline vs. Giants

Non-giants lead decline in the majority of states

## Where Non-Giant exposure is concentrated

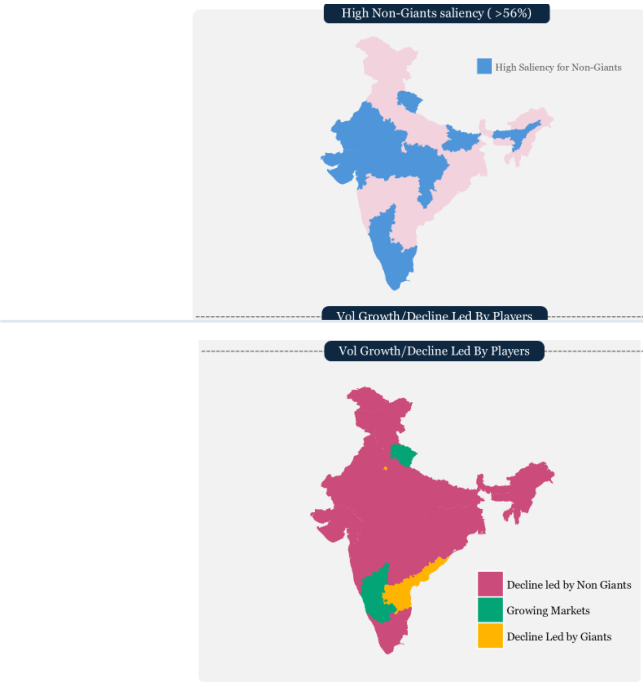
Top categories by volume contribution | AMJ'26



|                       |     |      |
|-----------------------|-----|------|
| Iodised Salt          | 16% | 1.3× |
| Packaged Atta         | 10% |      |
| Refined Edible Oils   | 9%  | 1.1× |
| Washing Powder/Liquid | 9%  | 2.2× |
| Non-refined Oils      | 7%  |      |
| Salty Snacks          | 7%  | 1.3× |
| Biscuits              | 6%  | 1.1× |
| Detergent Cakes/Bars  | 6%  | 2.0× |
| Spices                | 4%  |      |
| Others                | 27% |      |

## Geographic pattern

Non-Giant saliency and player-led growth/decline



Most states are decline-led by Non-Giants; only a small set of markets are growing or Giants-led.

### 3. Yet hope still persists!!!

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# Despite of fragile confidence, spending intent has improved

Urban income perceptions and spending improved, yet FMCG growth remains predominantly price-led rather than consumption-led.

## PERCEPTION CHANGE VS. LAST ROUND

| VARIABLE            | URBAN                           | RURAL                           |
|---------------------|---------------------------------|---------------------------------|
| Economic situation  | <div><div>↓</div>Worsened</div> | <div><div>↓</div>Worsened</div> |
| Employment          | <div><div>↓</div>Worsened</div> | <div><div>↓</div>Worsened</div> |
| Price level         | <div><div>↓</div>Worsened</div> | <div><div>↓</div>Worsened</div> |
| Income              | <div><div>↑</div>Improved</div> | <div><div>↓</div>Worsened</div> |
| Spending            | <div><div>↑</div>Improved</div> | <div><div>↑</div>Improved</div> |
| Consumer confidence | <div><div>↓</div>Worsened</div> | <div><div>↓</div>Worsened</div> |

Urban bright spot: income and spending improved, even as overall confidence weakened.

## FMCG GROWTH REALITY

### Value growth is outpacing physical consumption

| URBAN INDIA | 64% of measured FMCG |      |  |
|-------------|----------------------|------|--|
| +5%         | +1%                  | +1%  |  |
| VALUE       | VOLUME               | UNIT |  |

| RURAL INDIA | 36% of measured FMCG |      |  |
|-------------|----------------------|------|--|
| +7%         | +1%                  | +2%  |  |
| VALUE       | VOLUME               | UNIT |  |

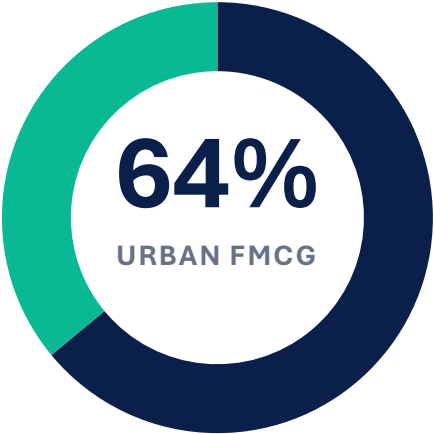
Growth is still price-led in both urban and rural markets.

**IMPLICATION** Convert improving spending intent into volume: make the value proposition unmistakable at pack, price and point of sale.

# Urban growth is moving from reach to convenience

Traditional trade still owns the urban basket, but MT and E.Com are driving nearly all volume momentum.

## MARKET FOOTPRINT



● **64%**  
Urban

● **36%**  
Rural

The strategic question is no longer whether urban matters, but which urban channel will capture the next unit of growth.

## 2-YEAR CAGR TO AMJ '26

|                                       | PRICE | VOLUME | VALUE |
|---------------------------------------|-------|--------|-------|
| <b>Omni Urban</b><br>Total urban      | 4%    | 4%     | 8%    |
| <b>Traditional trade</b><br>61% share | 5%    | -1%    | 4%    |
| <b>Modern trade</b><br>32% share      | 1%    | 8%     | 9%    |
| <b>E-commerce</b><br>7% share         | 5%    | 43%    | 49%   |

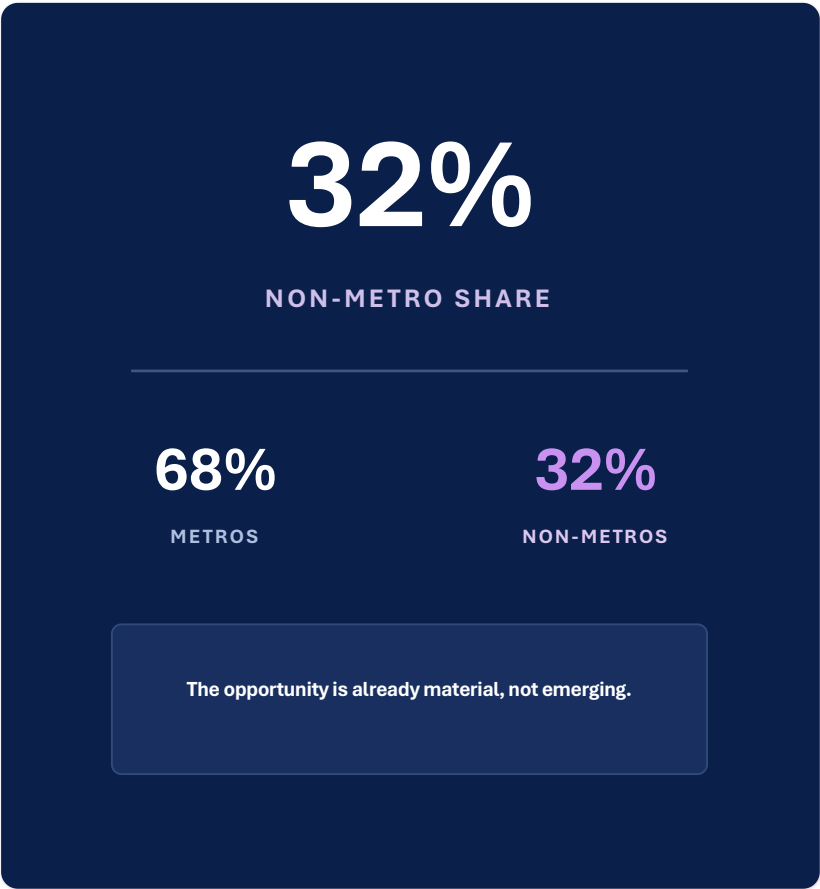
Modern trade and e-commerce together hold 39% share, but deliver the strongest volume growth.

## IMPLICATION

Defend traditional-trade scale but disproportionately fund modern-trade execution and e-commerce availability.

# The next organized growth wave is beyond metros

Non-metros already contribute nearly one-third of measured e-commerce.



## WHERE TO PLAY

01

**Convenience commerce**  
Win availability and speed.

02

**Digital shelf**  
Make discovery effortless.

03

**New need spaces**  
Health, beauty and lifestyle.

04

**Influence-led demand**  
Design for screen and shelf.

IMPLICATION

Build non-metro-ready packs, fulfilment and digital visibility now.

Source: NielsenIQ India FMCG Quarterly Snapshot, Q2 2026 (AMJ'26). Non-metro contribution is inferred from the reported 68% metro contribution to measured e-commerce.

# Non-metro MT grows 1.5× faster than metro MT

Store expansion is translating into sustained, broad-based volume growth outside metros.

1.5×  
FASTER GROWTH  
Non-metro vs metro

24.9%  
NON-METRO VOLUME GROWTH  
vs 13.4% in metros

121  
NON-METRO STORE INDEX  
vs 105 for metros

+16 pts  
STORE ADVANTAGE  
gap vs metros in AMJ'26

## THE STORY IN ONE LINE

### More stores are creating more growth

Non-metro modern trade has built a structurally larger footprint, and the volume growth gap is widening as that footprint scales.



IMPLICATION

Shift incremental distribution, availability and execution investments toward high-potential non-metro clusters.

**4. And this is how we win!!!**

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# Five growth codes to unlock the next wave of scale

A practical playbook spanning availability, relevance, wellness, digital demand and portfolio adjacencies

01

REACH

## Distribution Expansion

Widen availability and strengthen Traditional Trade execution to unlock volume and share.



More outlets,  
more throughput

02

RELEVANCE

## Innovation in flavors

Create distinctive propositions using innovative flavours and signature ingredients.



Unique flavours  
stronger distinction

03

WELLNESS

## Health-Forward Innovation

Build wellness benefits through better-for-you formats and protein enhancement.



Premiumisation  
with purpose

04

DIGITAL DEMAND

## Ride the E-commerce Wave

Go beyond major sale days and activate new occasions and seasonal demand moments.



Always-on  
demand creation

05

ADJACENCIES

## Expand into Allied Categories

Extend trusted propositions into adjacent categories and usage occasions.



New spaces  
to grow

BUILD SCALE

BUILD DIFFERENTIATION

BUILD PREMIUM VALUE

BUILD DEMAND

BUILD NEW POOLS

# 5. Hum Honge Kamiyaab!!!



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# Growth is shifting to newer channels and geographies

Channel polarization and inflation are rewriting where FMCG companies win.

## THE FIVE SHIFTS RESHAPING THE MARKET

01



**Traditional Trade is still the largest channel**

Build the channel for reach

02



**Modern trade sustains growth**

Become more visible on MT shelf

03



**E-commerce leads growth**

Become discoverable on ecommerce

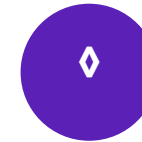
04



**Non-metros power MT and e-commerce**

Growth broadens beyond metros

05



**New dynamics new ways to grow**

Innovate, differentiate and communicate value



**THE BIG PICTURE**

**Digital acceleration** and **modern trade** are becoming disproportionate growth engines, while sustained **inflationary pressure** is reshaping category, manufacturer and channel competitiveness.



# ***Precision Targeting***

## **for Efficient Distribution Growth**

***Target Smarter, Reach Better, Grow Faster***

**Vikram Dhunta**  
EEMEAI Leader, Route to Market

**Charu Aggarwal**  
India Leader, Analytics & Activation

# Winning the last mile is harder than ever

Challenges that are raising the cost and complexity of reaching the right stores

01

## EXPANDING OUTLET UNIVERSE

Identifying pockets of new outlet growth

02

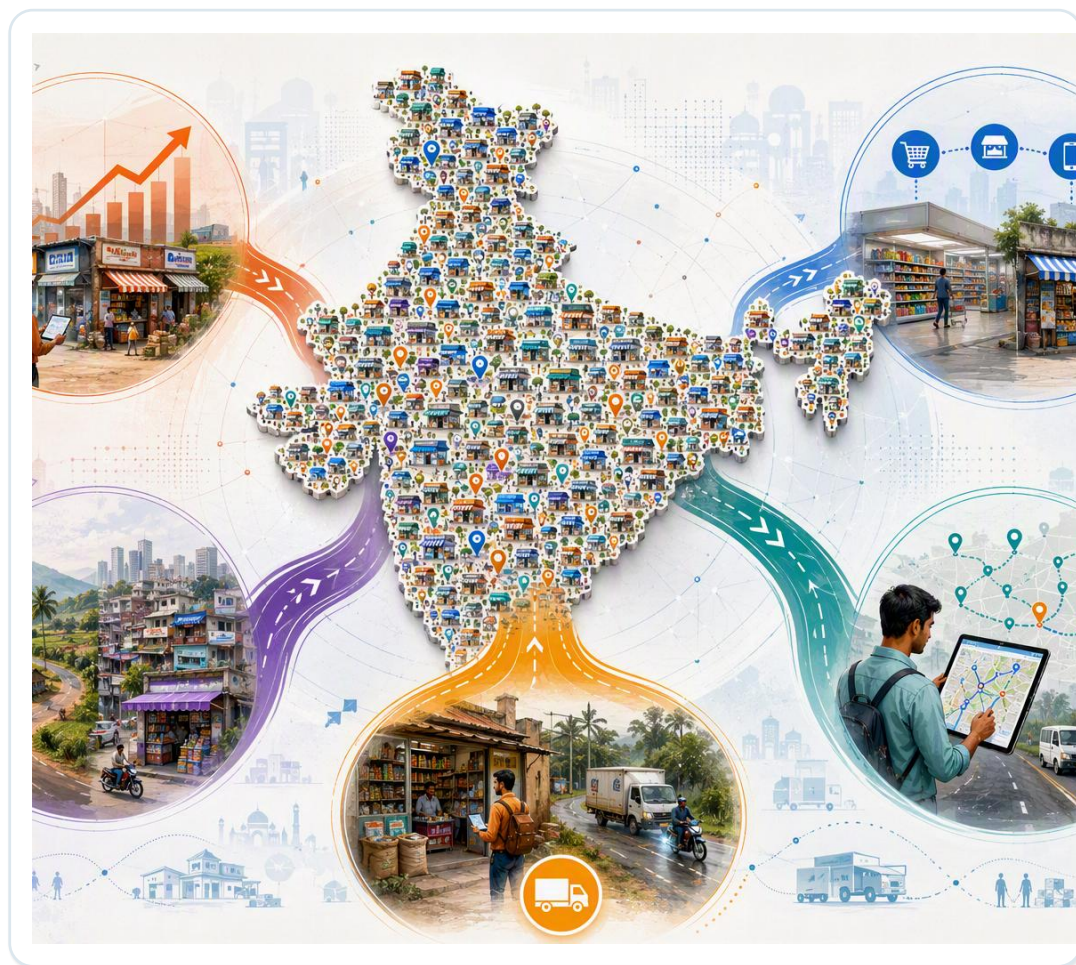
## LAST-MILE COMPLEXITY

Growth is elusive, granularity matters

03

## VAST, DYNAMIC OUTLET UNIVERSE

Poor outlet prioritization and shop shifting



04

## NAVIGATING RURBAN

Lower ROI in lower townclass in absence of right prioritization

05

## INEFFICIENT BEAT PLANNING

Static routes, excessive travel and low productivity

# Hence winning starts with Precision Targeting

Move from broad coverage to focused growth by choosing the right markets, then activating the highest-value stores



## Prioritize winning markets

Identify locations with the strongest growth headroom.

- Category sales potential
- Growth momentum
- Consumer demographics

Right location



## Activate golden stores

Within priority markets, target stores with the highest return.

- Revenue potential
- Shopper traffic
- Assortment opportunity

Right stores

IDENTIFY RIGHT LOCATIONS



ACTIVATE RIGHT STORES



ACCELERATE GROWTH

MARKET PRIORITISATION



IDENTIFYING

# Right Locations

Market Prioritization

NIQ



LOCATION  
INTELLIGENCE

# Prioritizing locations is critical in a vast, complex nation

**3.29 Mn km<sup>2</sup>**

Geographic area

**1.46 Bn**

Population

**372 Mn**

Households

**36**

States & Union Territories

**7,799 + 6.4 Lac**

Towns • villages

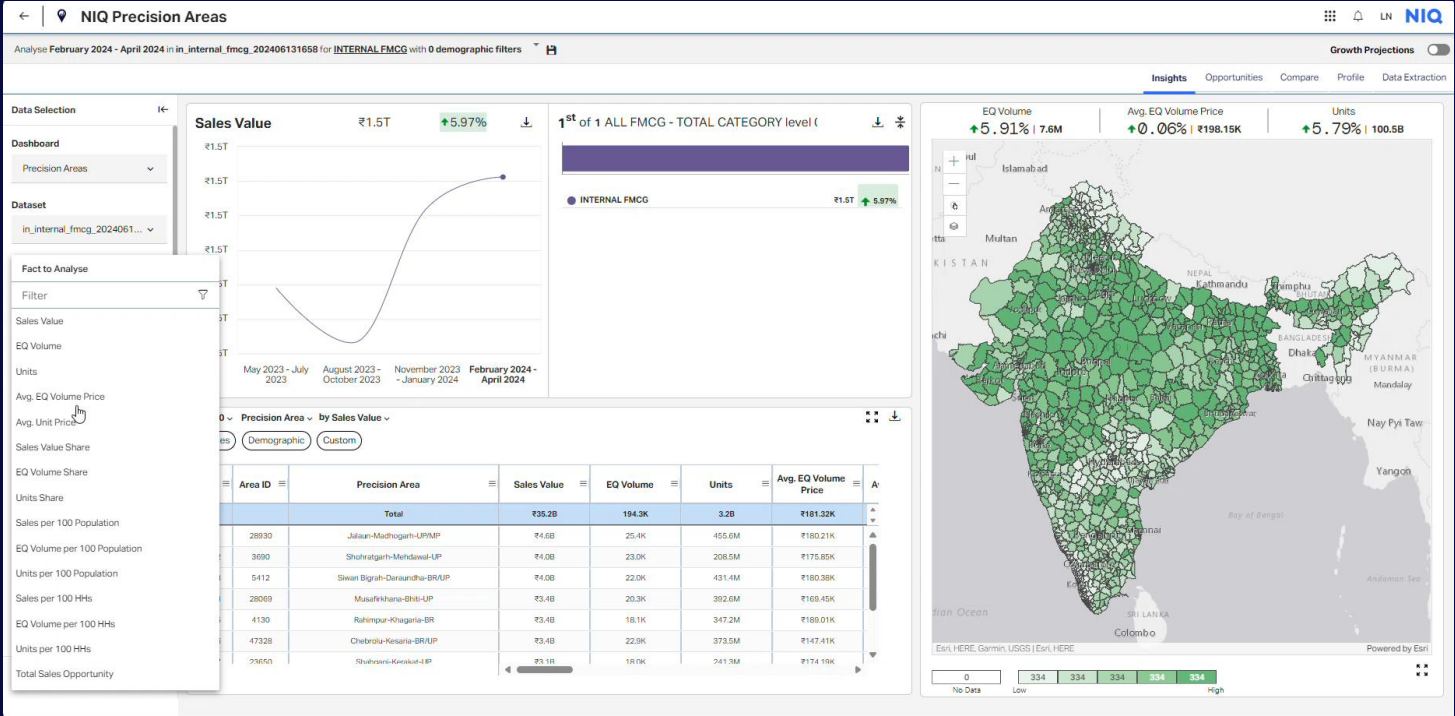
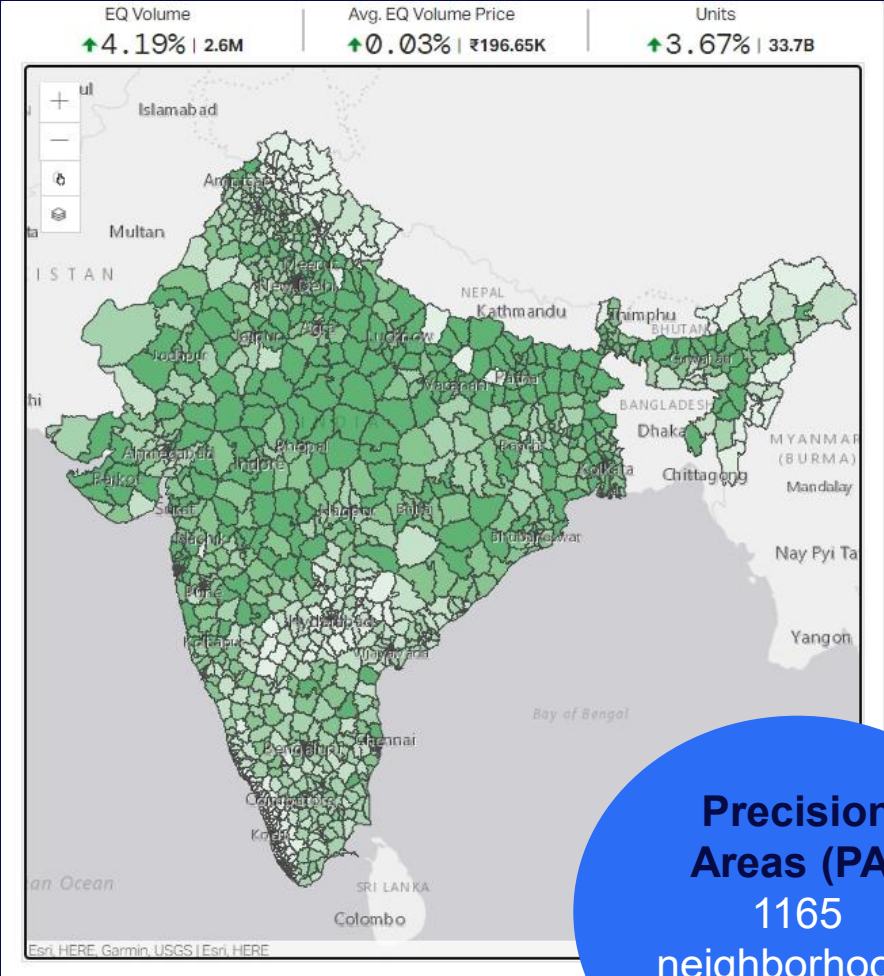
**11.8 Mn**

Traditional trade stores



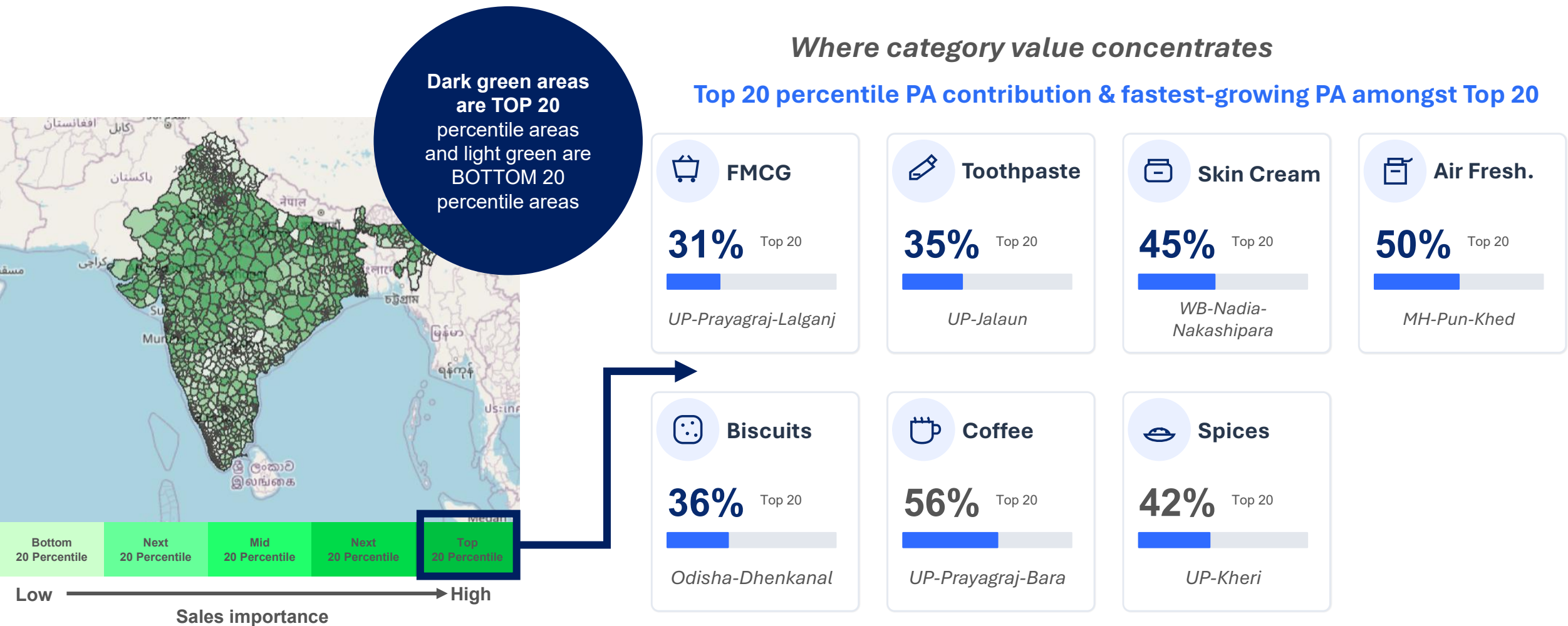
INDIA

# Using Retail sales, Demographics & Geospatial data category sales can be predicted at neighborhoods for granular market prioritization



Precision Areas (PA)  
1165 neighborhoods across India

# Local level visibility helps target impactful geographies for higher ROI



Source: NIQ Precision Areas, MAT May'26

STORE PRIORITISATION



# Reaching Right Stores

Golden Stores

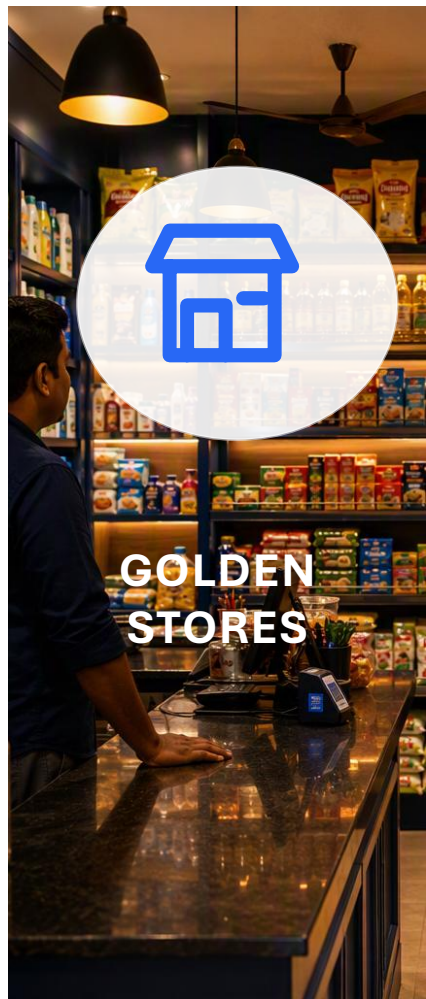
NIQ



STORE  
INTELLIGENCE

## KNOW THE “GOLDEN STORES”

Few stores with disproportionate share of value



### ACTION

Focus execution where every distribution win works harder

### WHY THEY MATTER



**9×**

**Sales multiplier**  
(vs bottom 20%)

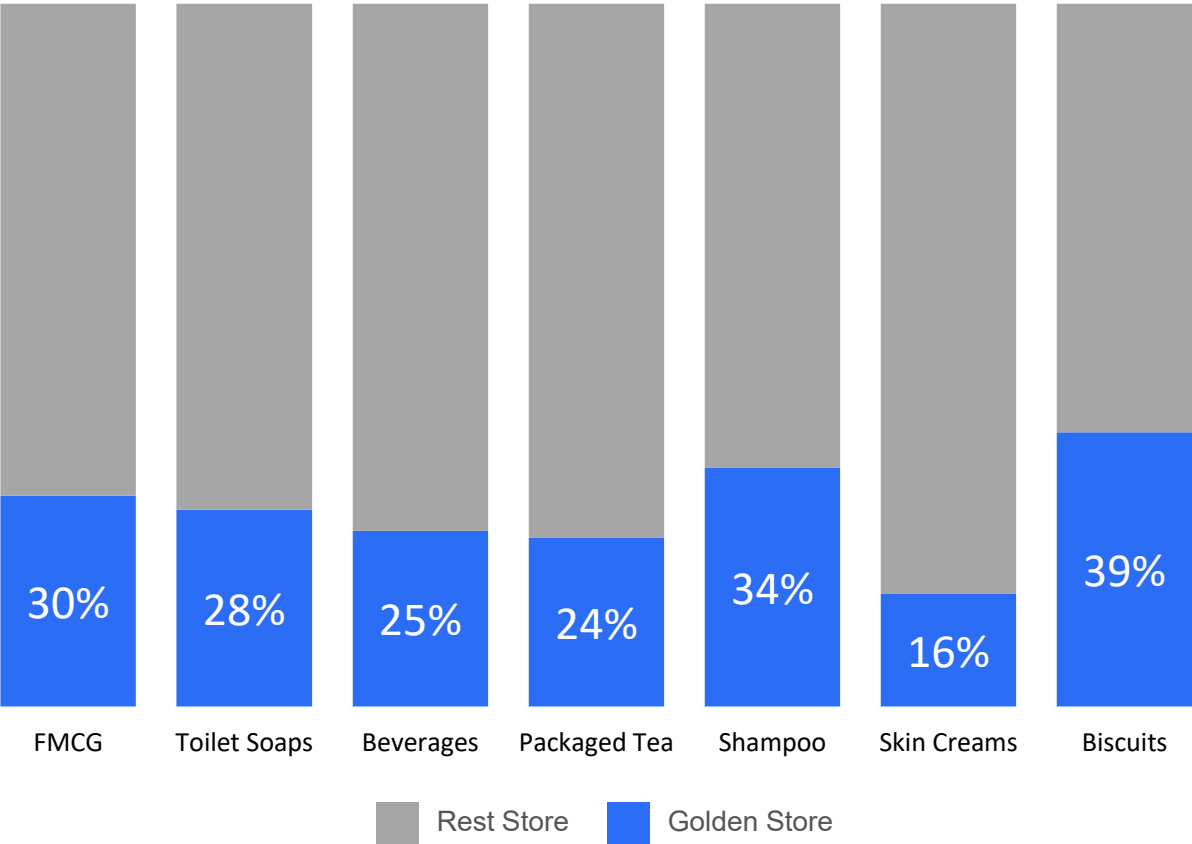


**5×**

**Wider assortment**  
(vs bottom 20%)

# Golden Stores vary by categories

Store Concentration Across Category – Traditional Trade



Source: NIQ RTM Distribution Optimization Analysis, MAT Mar'26  
\*Golden stores are those that contribute to top 80% of sales

## THE CLOSING THOUGHT

# Stop expanding everywhere. Start winning where it matters most.

*Precision targeting creates a clear line of sight from market choice to store action.*



### 01 PLACE THE BETS

**Prioritize markets with the strongest category headroom**



### 02 BACK THE WINNERS

**Deploy coverage and assortment behind golden stores**



### 03 KEEP REALLOCATING

**Refresh strategy as stores and channels migrate**

The outcome

Higher ROI • Lower distribution waste • Faster growth



# AGENDA

A curated morning of insight, connection and action



10:00 am – 10:10 am

**Welcome Address**



10:10 am – 10:40 am

**Winning in Turbulent Times : FMCG perspective**



10:40 am – 11:20 am

**Precision Targeting for Efficient Distribution**



11:20 am – 11:45 am

**Coffee Break**



11:45 am – 12:15 pm

**Panel : Winning FMCG Growth in a Changing Market:  
Where Should Leaders Place Their Bets**



12:15 pm – 01:15 pm

**Unlocking Hidden Growth with the Right Execution**



01:15 pm Onwards

**Lunch**

PANEL DISCUSSION

## Winning FMCG Growth in a Changing Market : Where Should Leaders Place Their Bets?



**Anubhav Krishan**

Sales Director, Consumer Product  
Division

**Himalaya Wellness**



**Nrusimha Panda**

VP, Sales & Logistics

**Dr. Oetker India**



**Jyoti Patankar**

VP Marketing, Mothers Recipe

**Desai Foods Pvt Ltd**



**Sujoy Das**

New Business Lead, South Asia

**NIQ**

IN-STORE EXECUTION

# Unlocking Hidden Growth with the Right Execution

Winning In Store

01

Portfolio  
Optimization

02

Pricing

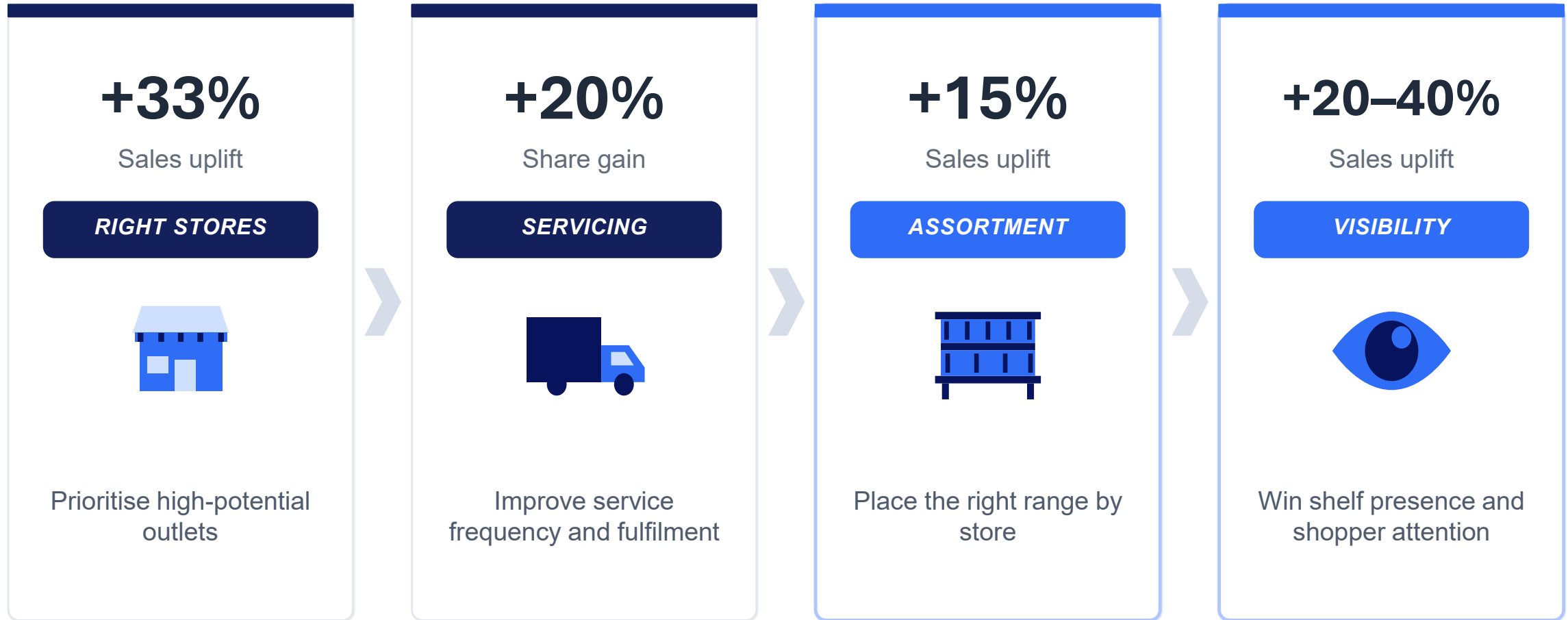
03

In Store  
Promotions

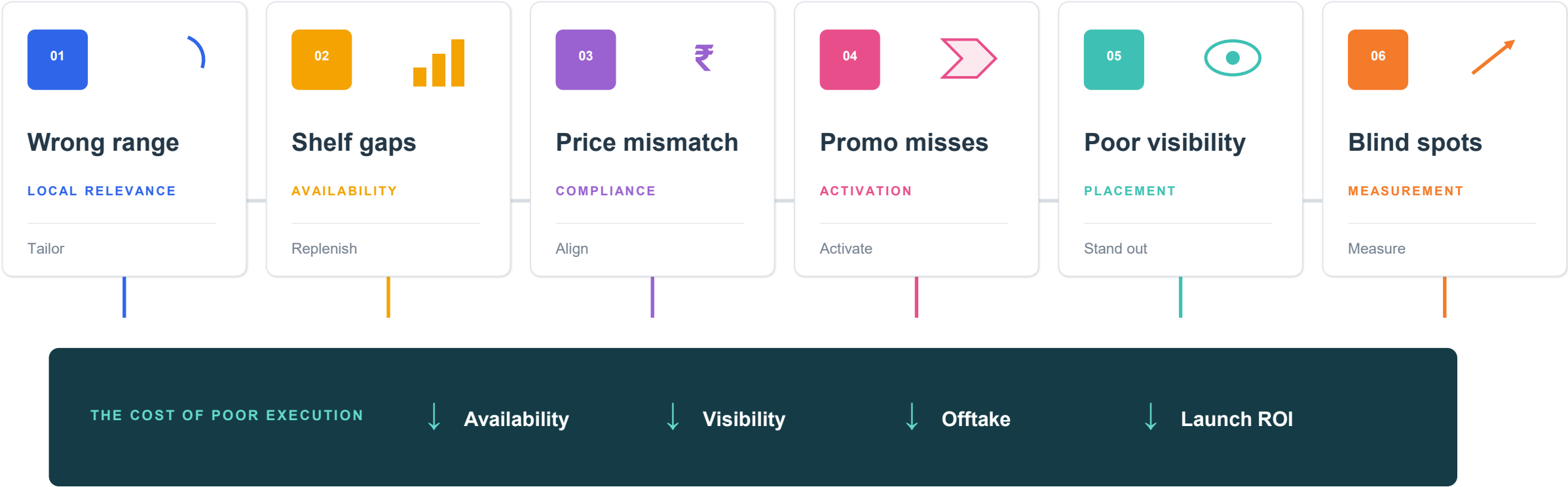
04 Shelf



# Better in-store execution can unlock up to 55% sales uplift



# But six execution gaps prevent brands from converting reach into sales



NIQ ANALYTICS

# A complete ecosystem to activate in-store sales growth

Connect strategic choices with precise execution, from portfolio and pricing to promotion effectiveness and ROI.



01

Portfolio Optimization



02

Price It Right



03

In-Store Promotions



04

Winning at Shelf



## SPEAKERS



**Teena Joshi**



**Shraddha Bhare**



**Vidya Sagar N**

From strategic choices to measurable retail execution

NIQ ANALYTICS

# A complete ecosystem to activate in-store sales growth

Connect strategic choices with precise execution, from portfolio and pricing to promotion effectiveness and ROI.



01

Portfolio Optimization



02

Price It Right



03

In-Store Promotions



04

Winning at Shelf



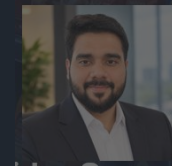
## SPEAKERS



Teena  
Joshi



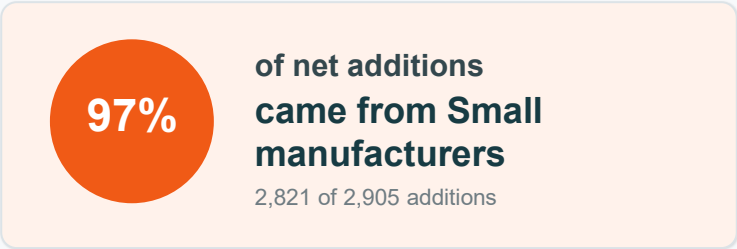
Shraddha  
Bore



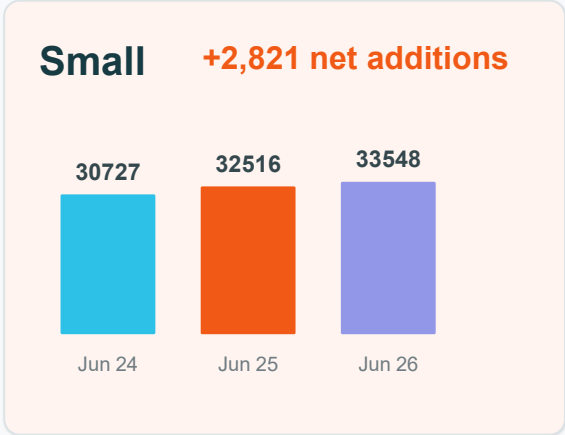
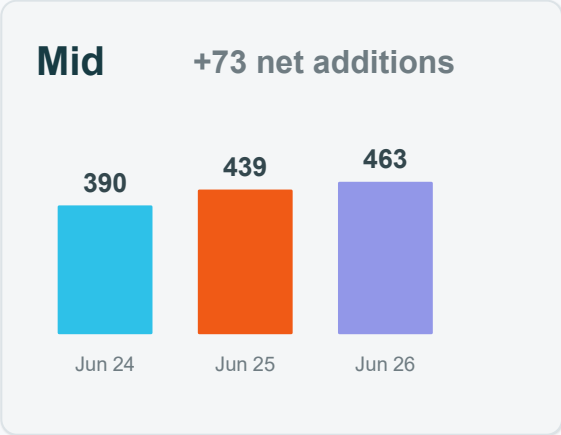
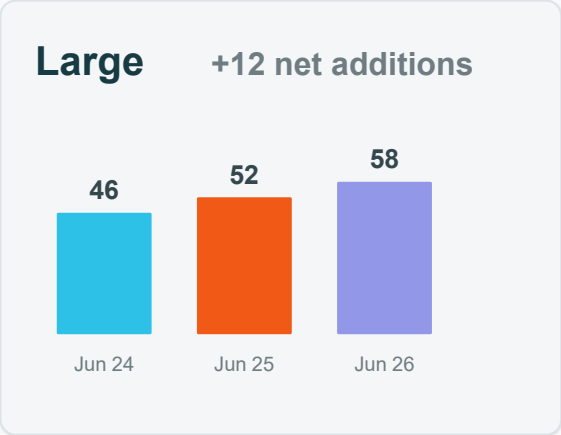
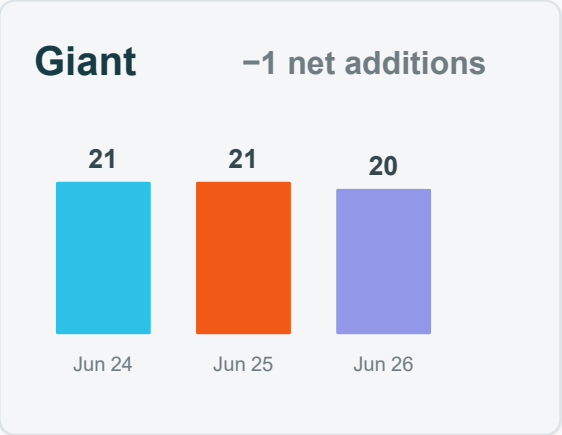
Vidya  
Sagar N

From strategic choices to measurable retail execution

# Traditional Trade is becoming more competitive, led by small and emerging manufacturers



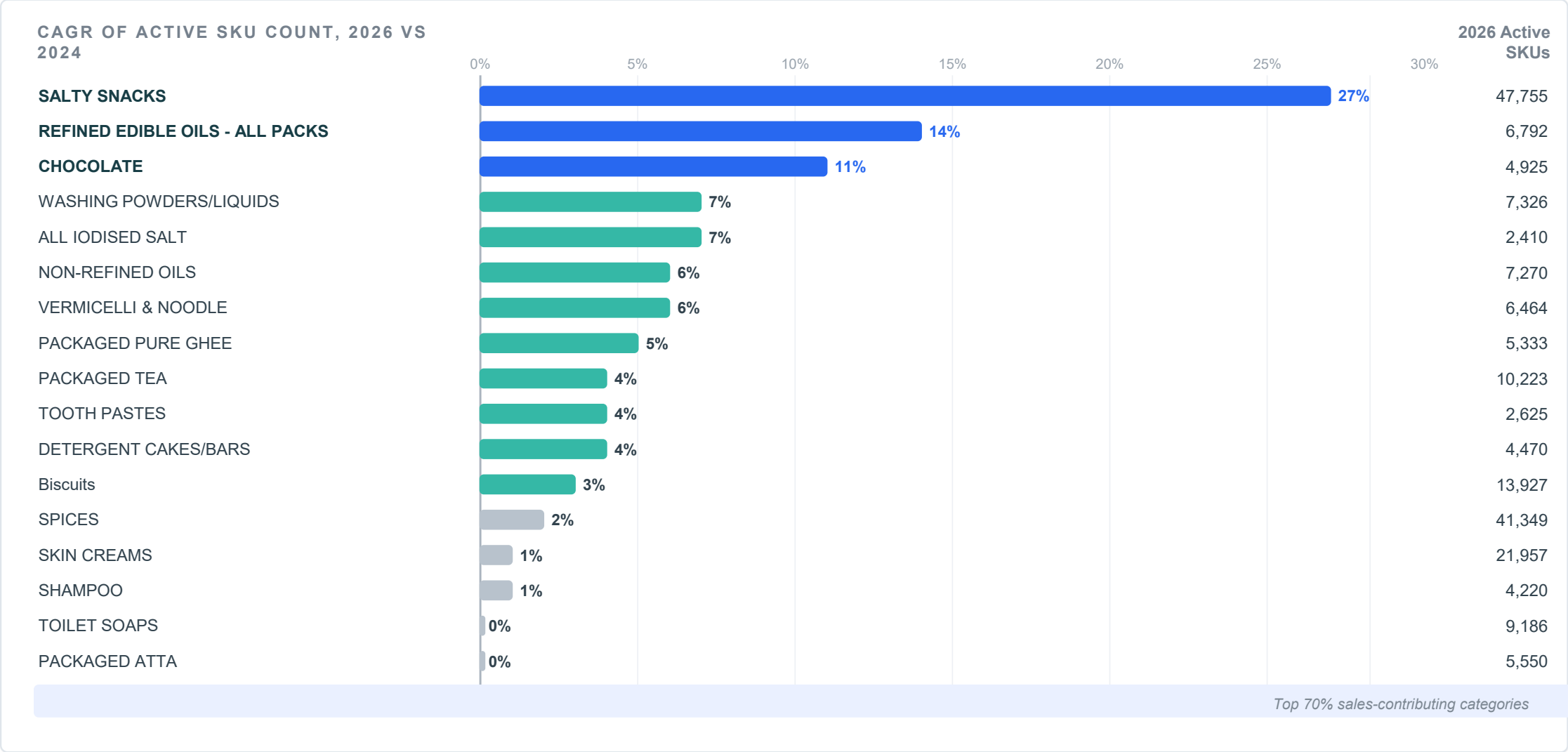
## Manufacturer universe by size



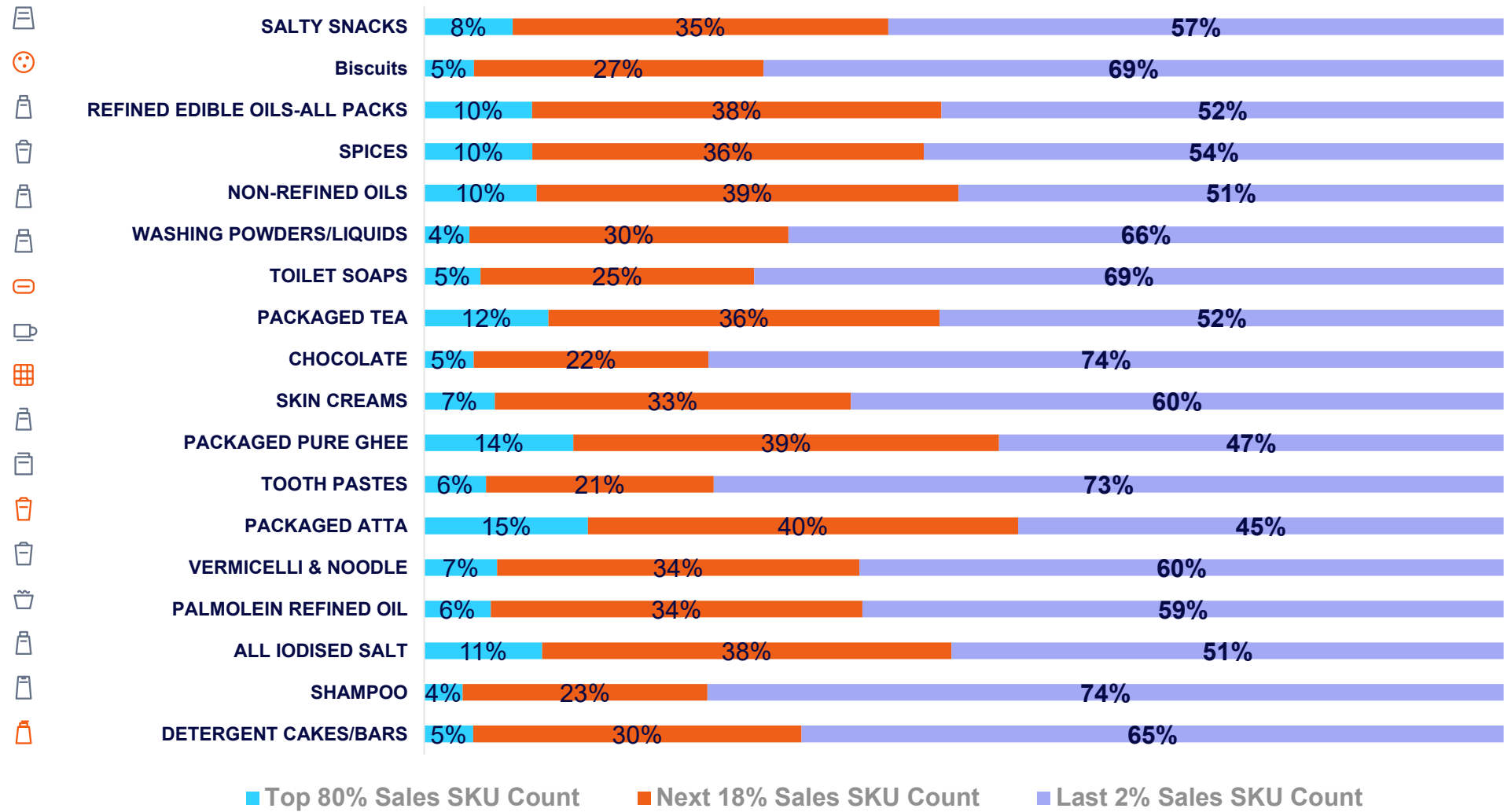
Small Manufacturers < Rs 100 Cr | Mid: Rs 100 – 1000 Cr | Large : Rs 1000 – 5000 Cr | Giants :> Rs 5000 Cr in MAT June 26

# At the same time, growth in Active SKUs is increasing assortment complexity across FMCG

Active SKU analysis | 2026 vs 2024



# Still, Up to 50% of the SKUs contribute only the last 2% of category sales



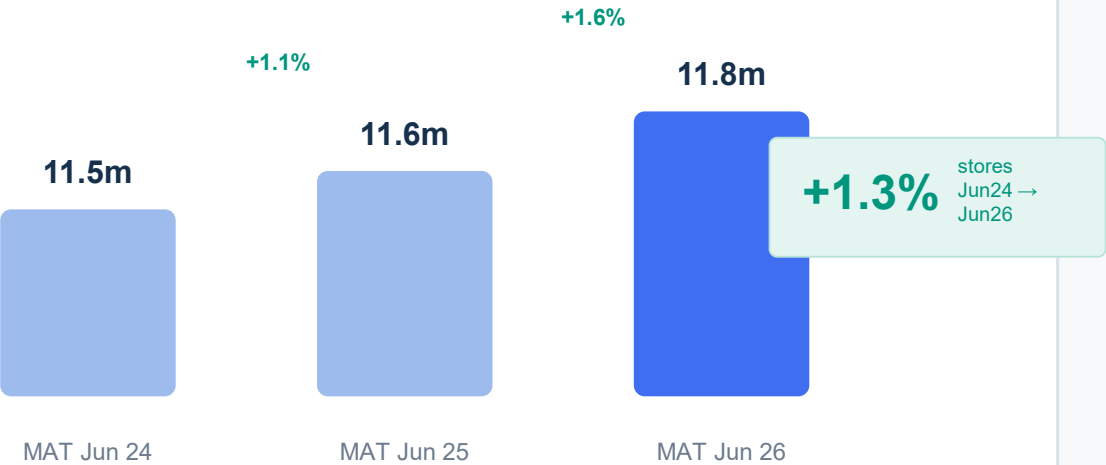
All India TT | MAT June 26

# Do we need so many SKUs? - As Shelf capacity remains unchanged

## STORE UNIVERSE

### Number of stores retailing

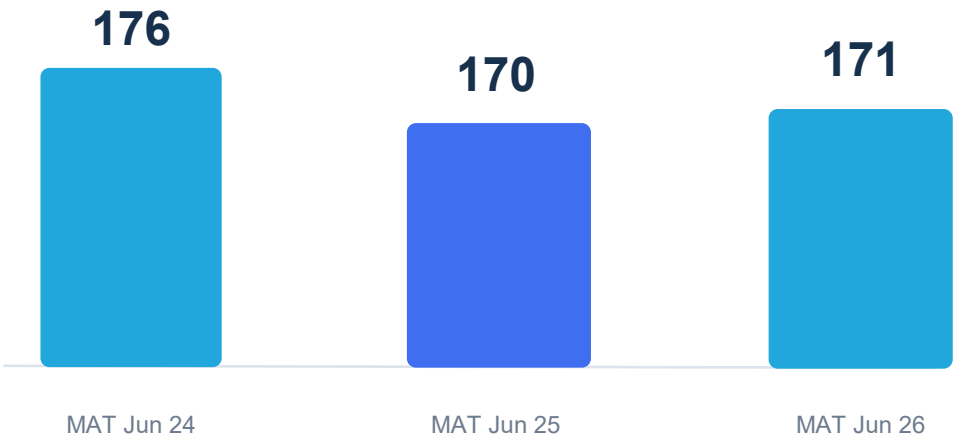
Steady expansion across the last two MAT periods



## SHELF CAPACITY

### Average items per store

Shelf capacity has remained broadly stable



Source: RMS| All India (U+R)TT



# From assortment headroom to market-level action

## A CASE STUDY

INSIGHT → PRIORITISATION → LOCAL EXECUTION



# A leading biscuit player turned strong reach into targeted assortment action



01

## BUSINESS CHALLENGE

### Convert strong reach into share growth

- One of leading Biscuit manufacturer with 80% weighted distribution
- Needed the clarity on right assortment size and range



02

## NIQ SOLUTION

### Optimise both range depth and SKU mix

- Set ideal assortment size by state and population strata
- Define the right SKU mix by state, Pop Strata



03

## BUSINESS IMPACT

### Translate opportunity into targeted execution

- Prioritize markets with largest assortment gaps
- Right Product Mix at by State and population-strata was recommended

# Despite 80% weighted distribution, shallow assortment limited the player's share potential



80%

Weighted distribution

Presence across quality biscuit stores



30%

All India share



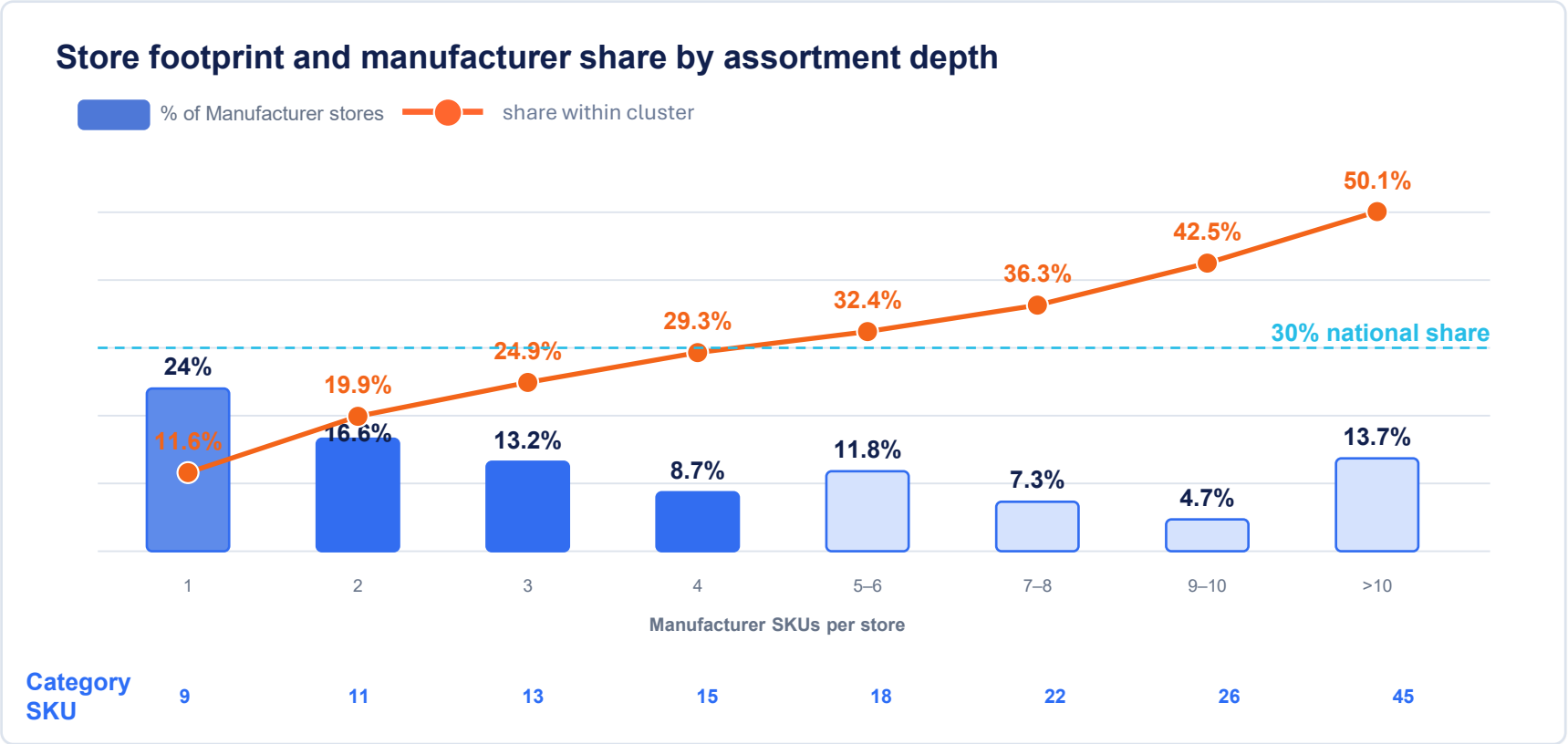
60%

Stores carry ≤4 SKUs



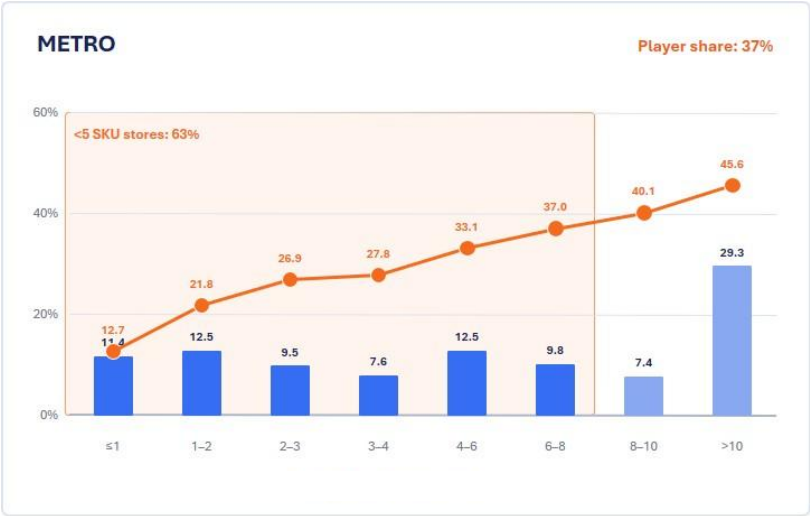
5-6 SKU

Ideal Size

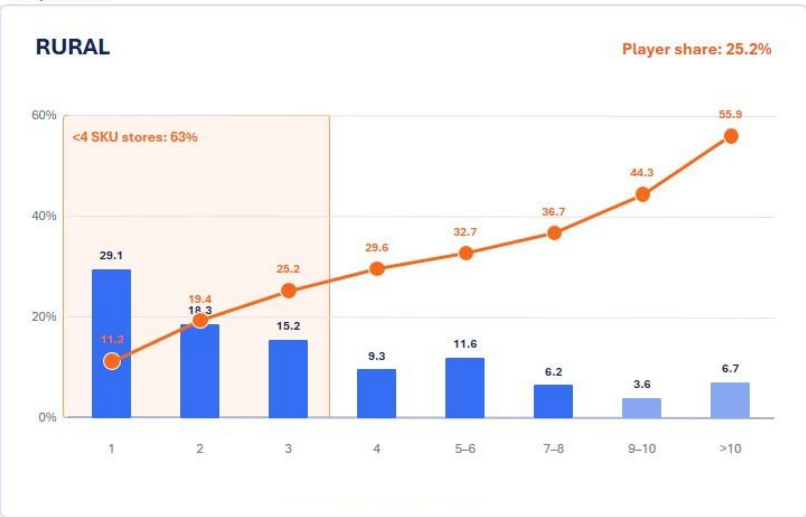


Prioritize moving stores from 1–4 SKUs into 5–6+ SKUs

# Market-specific assortment targets revealed where and how much to expand



Store %      Player share



## Recommended assortment by market

Avg. uplift +2

| Market × Pop Strata | Current Assortment | Recommended Assortment | Δ  |
|---------------------|--------------------|------------------------|----|
| Market 1 × Metro    | 5                  | 8                      | +3 |
| Market 1 × TC1      | 4                  | 6                      | +2 |
| Market 1 × ROU      | 3                  | 5                      | +2 |
| Market 1 × Rural    | 2                  | 4                      | +2 |
| Market 2 × Metro    | 9                  | 11                     | +2 |
| Market 2 × TC1      | 7                  | 8                      | +1 |
| Market 2 × ROU      | 6                  | 6                      | —  |
| Market 2 × Rural    | 2                  | 3                      | +1 |
| Market 3 × Metro    | 8                  | 10                     | +2 |
| Market 3 × TC1      | 7                  | 9                      | +2 |
| Market 3 × ROU      | 5                  | 8                      | +3 |
| Market 3 × Rural    | 4                  | 6                      | +2 |

# Market-specific SKUs based on customer demand, not just sales velocity.

Recommended SKU Mix is not driven by Sales or Market share however it is recommended based on market preference

● Distinctive

● Core overlap

 METRO

8 SKUs

● Cookies × Cashew × Brand 1 × 50gm

● Cookies × Butter × Brand 2 × 30gm

● Cream × Chocolate × Brand 3 × 50gm

● Cookies × Butter × Brand 4 × 50gm

● Premium Cream × Brand 5 × 60gm

● Premium Cream × Brand 6 × 60gm

● Cookies × Brand 2 × 30gm

● Crackers × Brand 9 × 70gm

Preference signal

Premium creams, chocolate cream and crackers expand choice.

 RURAL

3 SKUs

● Cookies × Cashew × Brand 1 × 50gm

● Marie × Brand 10 × 60gm

● Marie × Brand 10 × 280gm

Preference signal

Everyday Marie formats, including a larger 280gm family pack

## Market complexity demands assortment precision

### KEY TAKEAWAYS

- 1 **Market complexity matters**
- 2 **Along with Market Potential, Distribution network plays an important role**
- 3 **One average cannot guide every store**
- 4 **Ideal Assortment Mix should be based on Consumer Demand**



**The winning assortment is not the largest range. It is the most relevant range for each market, store type and shopper context.**

NIQ ANALYTICS

# A complete ecosystem to activate in-store sales growth

Connect strategic choices with precise execution, from portfolio and pricing to promotion effectiveness and ROI.



01

Portfolio Optimization



02

Price It Right



03

In-Store Promotions



04

Winning at Shelf



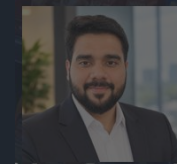
## SPEAKERS



Teena  
Joshi

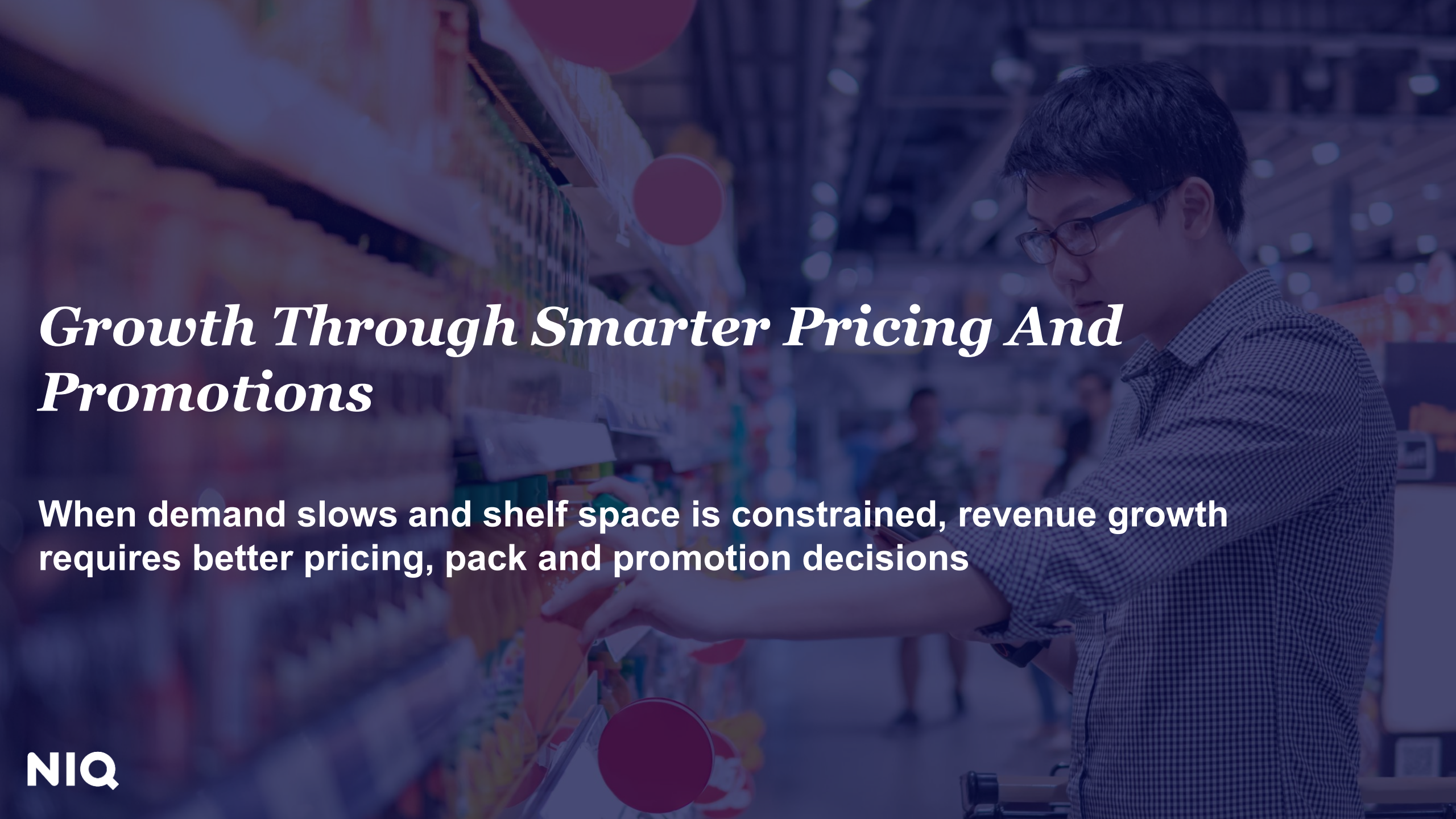


Shraddha  
Bhare



Vidya  
Sagar N

From strategic choices to measurable retail execution



# *Growth Through Smarter Pricing And Promotions*

**When demand slows and shelf space is constrained, revenue growth requires better pricing, pack and promotion decisions**

# Are you being PROACTIVE or REACTIVE ?

*In a market shaped by disruption and cautious consumers, profitable growth depends on choosing the right price, pack and promotion actions.*

## Magic Price Point Disruption



## GST 2.0



## Growing Consumer Caution



## Channel Shift

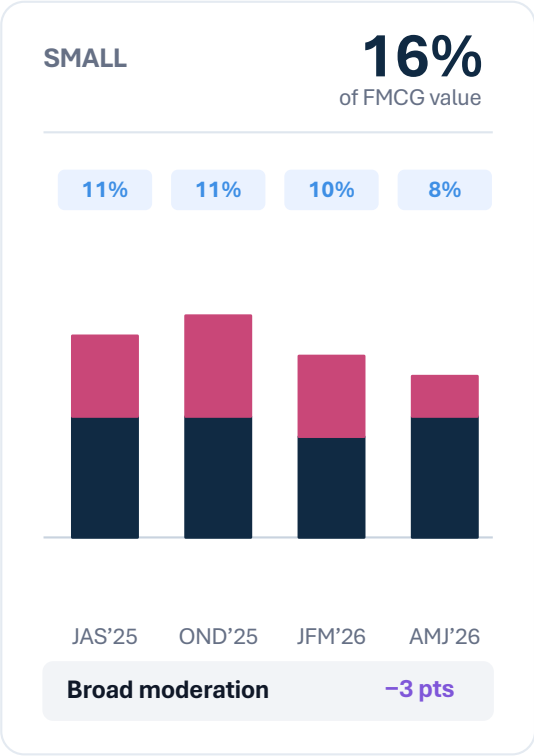
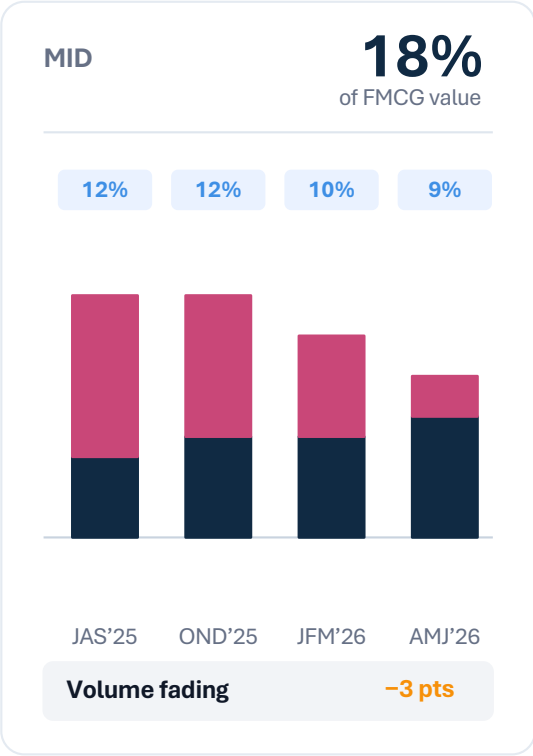
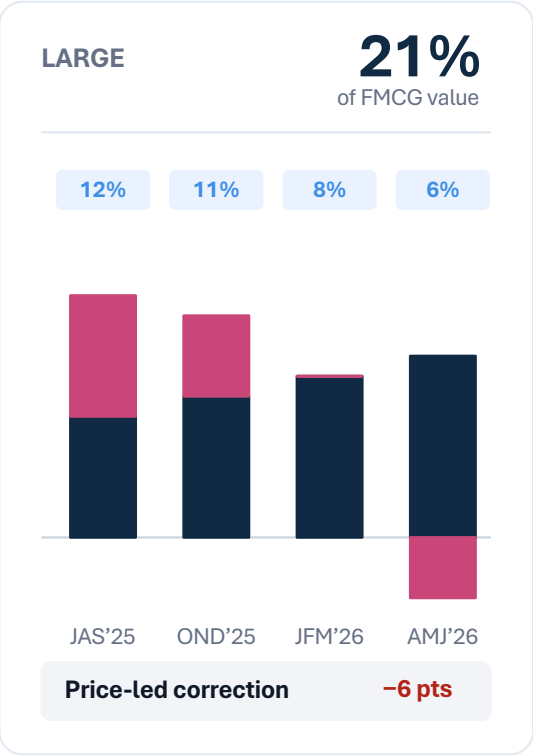
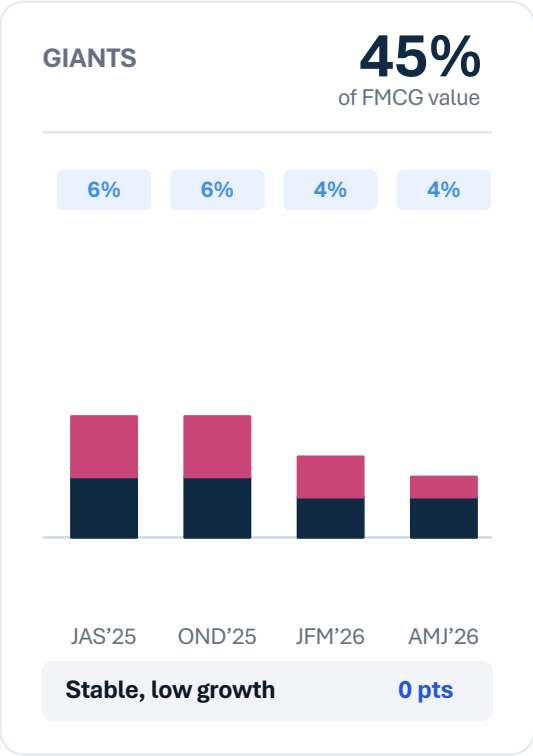




# Growth is slowing across every manufacturer tier

Cost pressure is increasingly shifting growth from volume to price, especially among Large manufacturers

Large manufacturers are now fully price-led: 9% price growth is offset by -3% volume, bringing value growth down to 6%.



HOW TO READ

Price growth

Volume growth

Value growth

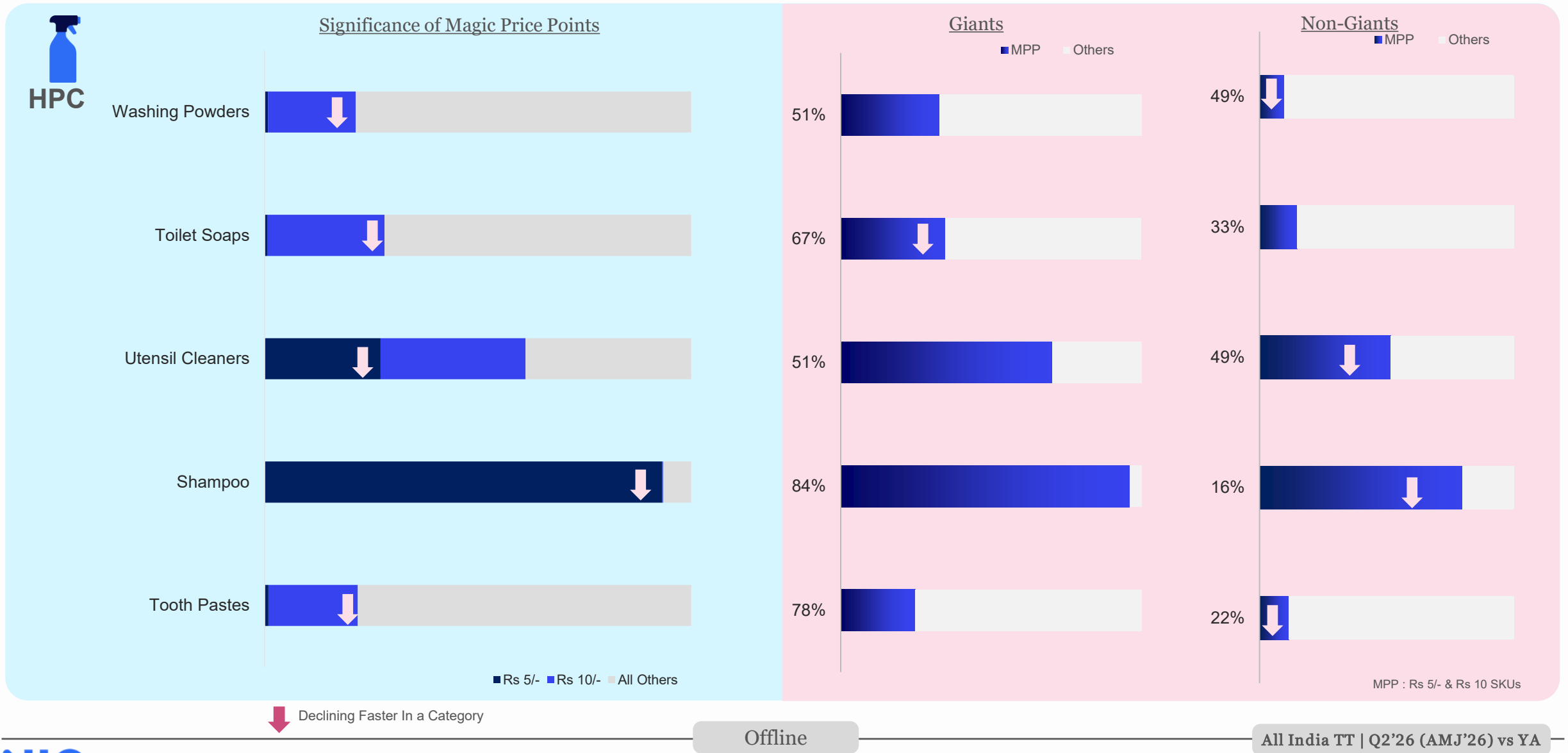
Labels shown on AMJ'26 bars; blue markers show reported value CAGR.



Key takeaway: Price increases alone are no longer enough. We need a more holistic approach across pricing, promotions and price-pack architecture.

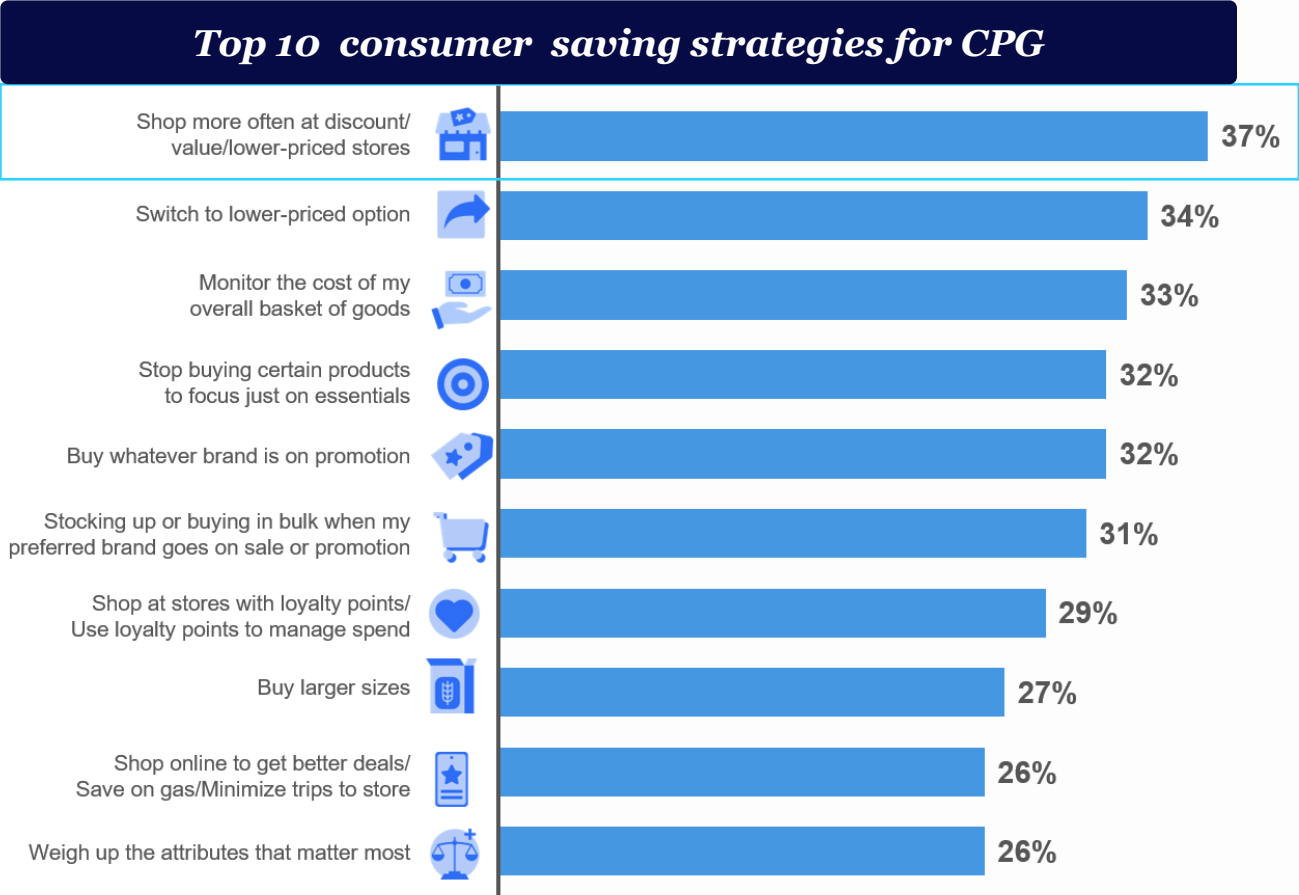
# Traditional trade is highly dependent on magic price points of ₹5 and ₹10

## Non giants suffer the most with increasing exposure to inflation-led pressures

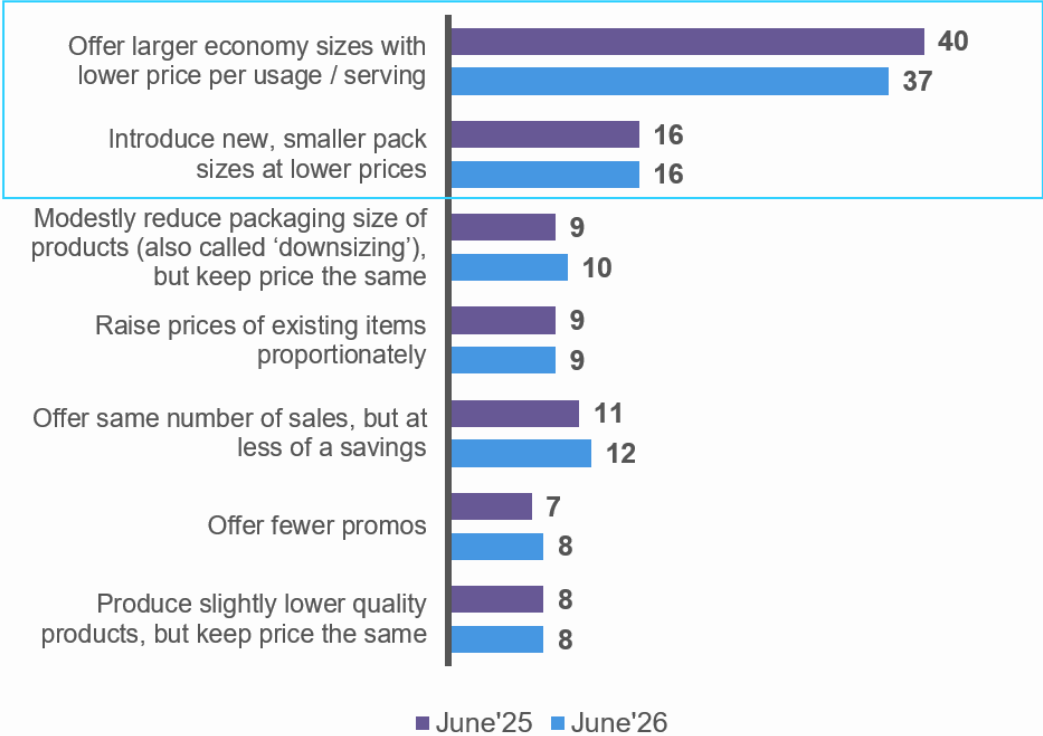


# Consumers are adapting their behaviour, not simply looking for lower prices, but chasing **VALUE**

## Price-pack optimization is becoming more important than discounts



*If prices continue to increase/remain high in the next 3 months...*  
What actions would you prefer your brands and retailers take, related to the products you purchase?



Source: NIQ 2026 Consumer Outlook

# Winning growth starts with offering the right pack at the right occasion

A biscuit challenger drove growth by building a portfolio that served both entry-level shoppers and premium-value seekers.

## Packaged Food

### Market Situation

Giant – Market Leader  
Rs. 10 Pack, 55 gm

Non Giant – Challenger  
Rs. 10 Pack, 45 gm

### Winning Move

- Non Giant – Challenger
- Launched Rs. 5 trial pack – high penetration
  - Launched Rs. 20 family pack – better value
  - Reduced focus on Rs. 10 Pack

### Result

- Non Giant – Challenger
- More HH entered through Rs. 5 Pack
  - Existing buyers trade up to Rs. 20 Pack
  - Share gain without directly outspending the leader



- ✓ Different consumers seek different definitions of value
- ✓ Growth comes from offering relevant pack choices, not simply lowering prices
- ✓ Well-designed pack size architecture can improve both penetration and value realization

Source: NIQ RMS



# Don't just know price elasticity – beat it!

## Brands are using scenario-based pricing to reduce risk

### Portfolio won category share

#### Results Validated

**Business Situation:** A confectionery brand that was worried about its ability to continue to take price increases without impacting revenue.

1

Multiple simulations run to give 2 key recommendations →

Downsize 2 key sizes by 10%

2

Increase price by 20% on the highest selling pack

# Growth requires managing the entire value equation



Source: BASES meta-analysis across ~40 Line & Price projects conducted in 2022 and 2023

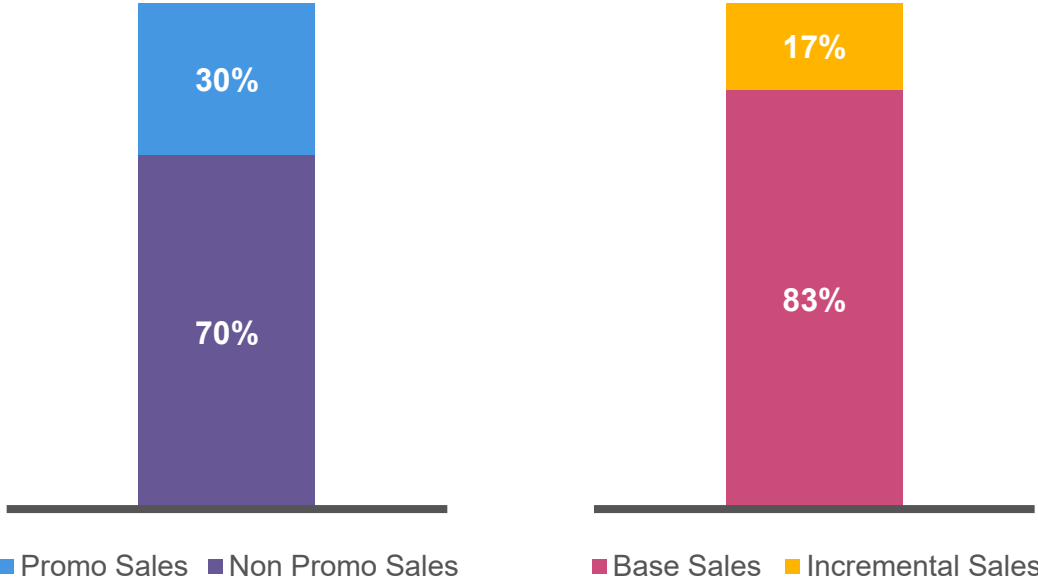


# Promotions: The Most Overused Growth Lever

# In Modern Trade India, nearly half of promotional sales fail to generate incremental volume

## Total India Snapshot - 2025

Category Sales Proportion



13 % of these sales would have happened even without promo/ discounts!

Category Landscape (RMS)



Are You Leaving Money On The Table ?



Do you know which products to put on promo and how much?

Source: NIQ Everyday Analytics EDA Dashboard 2025

# Not every SKU needs a promotion

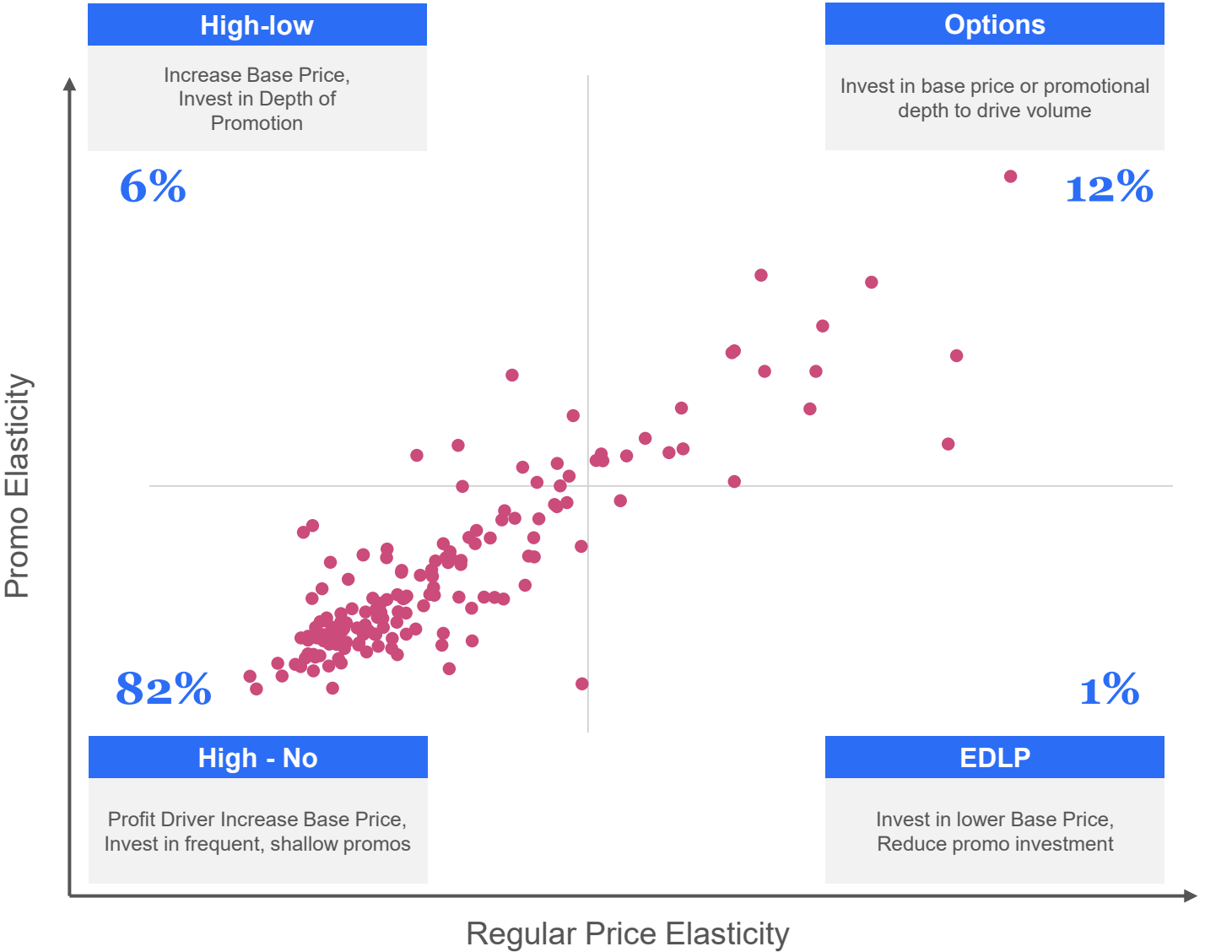


88%

Of Items still hold a potential for further **price increase** without significant volume losses

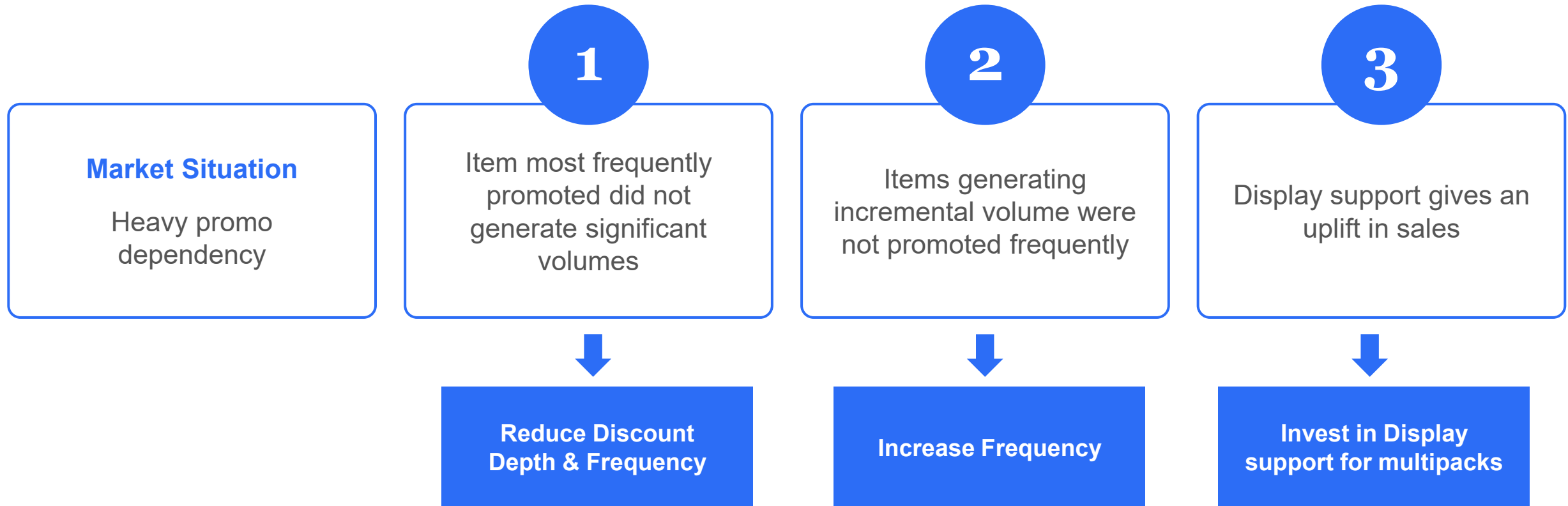
18%

Of Items are highly sensitive to the **promotions** – target scope for discount activation!



# Promotion effectiveness can be improved without increasing spend

**Business Situation:** Packaged food manufacturer with heavy reliance on promotions potentially eroding premium positioning, while simultaneously driving seemingly unnecessary promotional investments.



# Three questions you should ask



## Are my pricing decisions proactive and future-ready?

- Identify items that have low price elasticities – Protect Pricing Power



## Are my promotions delivering true incremental value?

- Remove blanket discounts
- Identify which items need promotions
- What should be the Depth & Frequency



## Is my portfolio designed for today's consumer behavior?

- Identify which pack price combination works

**Winning in today's market requires connected decisions across price, promo, and pack**

NIQ ANALYTICS

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## SPEAKERS



**Teena Joshi**



**Shraddha Bhare**



**Vidya Sagar N**

From strategic choices to measurable retail execution

IN-STORE EXECUTION × INNOVATION

# Winning at the Shelf

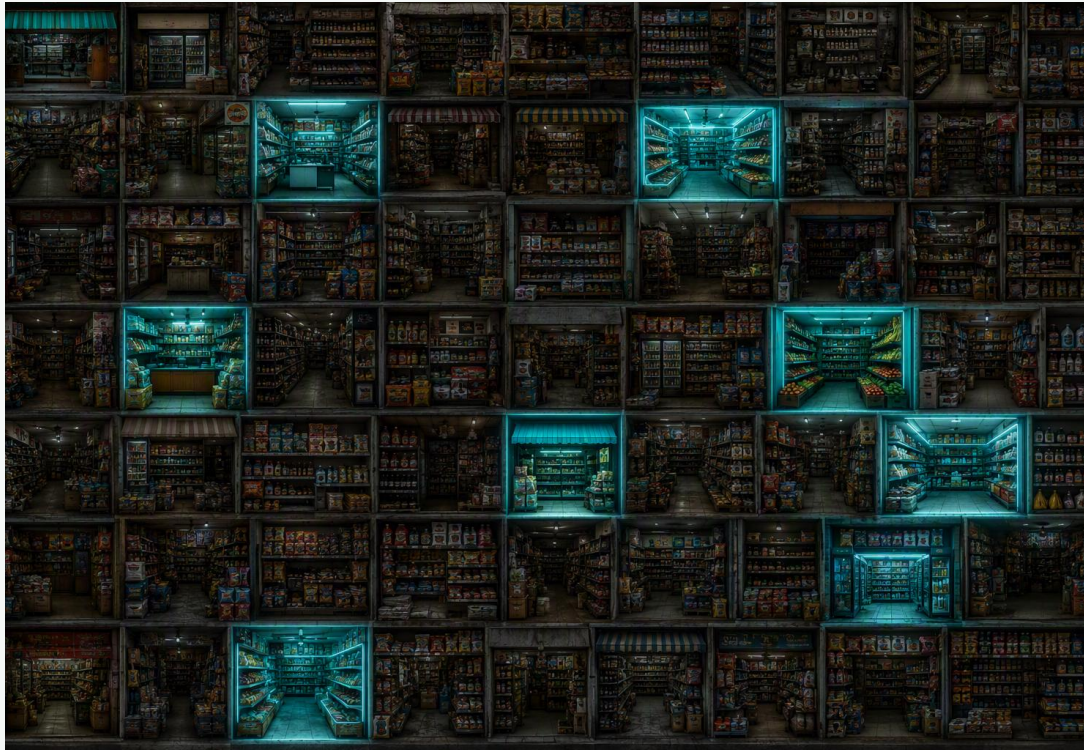
*From in-store precision to launch vitality*

*How better execution today and faster launch learning tomorrow turns store-level evidence into scalable growth*



# The shopper arrives with intent. The shelf decides conversion.

Category intent is often formed before the visit, but the brand, pack, price point and final purchase remain exposed to store reality.



**65%**

**Category purchases**

are pre-planned

**67%**

**Final decisions**

are made in-store

**The store does not simply fulfil demand. It can redirect demand.**

**The shelf is the final media channel and the final conversion point.**

Source: NIQ meta-learning from separate execution studies; figures illustrate category intent versus final in-store choice.

# Presence is not performance. Productivity is the commercial outcome.

A visibility element can be installed and compliant, yet still fail if the right assortment, position, facings or stock is missing.

### 1. FROM DISTRIBUTION

Getting the product to the store



- Efficient distribution
- On-time delivery
- Right product mix
- Strong availability

**FOUNDATION FOR GROWTH**

### 2. SHELF VISIBILITY

Winning the right space



- Prime shelf placement
- Strong visibility & facings
- Planogram compliance
- Attractive merchandising

**WIN THE MOMENT**

### 3. SHOPPER PICK-UP

Driving purchase and repeat



- Attracts attention
- Easy to find & choose
- Drives impulse & trial
- Builds loyalty & repeat

**CONVERT & GROW**

**RIGHT PRODUCT. RIGHT PLACE. RIGHT EXECUTION. MORE SALES. >>>**

**68%**

**Observed  
executions**

did not yield desired  
ROI

**1.4×**

**Sales uplift**

with shelf visibility

**1.2×**

**Sales uplift**

after equipment  
became pure

**Execution has three  
levels**

**Accessible visibility  
levers**

**PRESENCE → QUALITY → PRODUCTIVITY**

**SHELF POSITION • FACINGS • POSM • STOCK**

**Measure what changed shopper conversion, not only what was installed.**

Source: NIQ meta-learning from separate execution studies; metrics are separate and must not be combined.

# The store universe expanded faster than execution infrastructure.

Across six metros, ~87K additional outlets were added between 2021 and 2024, increasing the value of outlet prioritization.

**+12.9%**

Store universe

**+1.1%**

Outlets with cooling

**-5.8 pp**

Cooling penetration

56.0% → 50.2%

**+16.6%**

Paid displays

Paid-display penetration:  
4.56% → 4.71% | +0.15  
percentage points

## Meaning

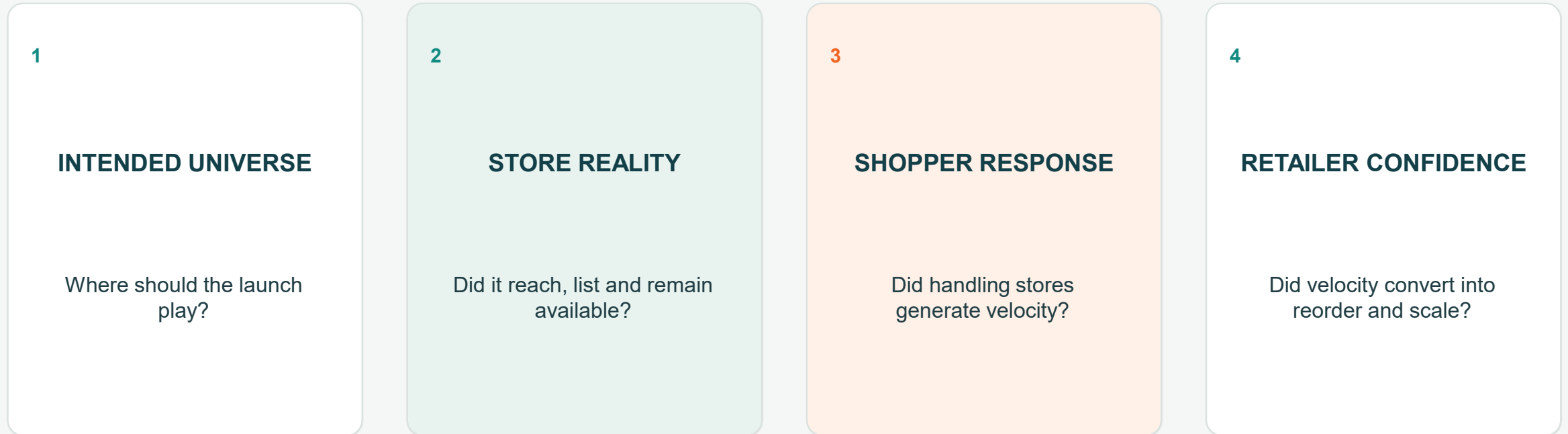
The universe grew by 87,437 outlets, but cooled outlets barely moved. More outlets without proportional infrastructure make prioritisation more valuable than blanket coverage.

**Choose where to deploy people, coolers, displays and launch support before asking teams to execute.**

Source: 2021–2024 census comparison; six metros; calculations use unrounded outlet counts.

# Execution is not a chapter before Innovation. It is the first launch signal.

A launch cannot be judged until the team separates proposition performance from distribution and shelf execution.



**If launch execution is weak, early sales understate the idea. If execution is sound and velocity is weak, the proposition needs work.**

**The innovation story starts in-store: reach → reality → response → reorder.**

Source: NIQ BASES India innovation framework and NIQ retail execution logic; synthesis created for this event.

## Indian breakthrough launches win on both reach and rate of sale.

NIQ India evidence shows that standout innovations do not merely enter more stores; they convert materially faster once present.

**4×**

**Higher velocity**

top innovators vs category-  
average new launches

**2×**

**Distribution**

top innovators vs category-  
average new launches

**23**

**Breakthrough winners**

recognized in India, 2026

**17**

**Wavemakers**

promising recent launches  
recognized

**2026 India edition: 12 strategies for breakthrough success, centred on new occasions, scale, repeat and sustained growth.**

**The India benchmark is not maximum distribution. It is distribution that produces superior velocity.**

Source: NIQ India Breakthrough Innovation 2026; NIQ “Break Through to the Winners’ Side: India Edition”, 21 May 2026.

## 30–60–90 days: three reads, three India-calibrated decisions.

The operating rhythm moves from execution proof to velocity proof and finally to scalable, omnichannel growth.

0–30 DAYS

### Did the launch land?

**2×** Top Indian innovators achieve twice the distribution.

- Target-store listing
- Availability / pricing
- Planned support present

**FIX EXECUTION**

31–60 DAYS

### Is the launch converting?

**4×** Top Indian innovators deliver four times the velocity.

- PDO / rate of sale
- Outlet-type variance
- Trial and repeat signals

**FOCUS SUPPORT**

61–90 DAYS

### Can the model scale?

**7%** E-commerce now represents 7% of FMCG sales nationally in India.

- Reorder consistency
- Sustained velocity
- Channel economics

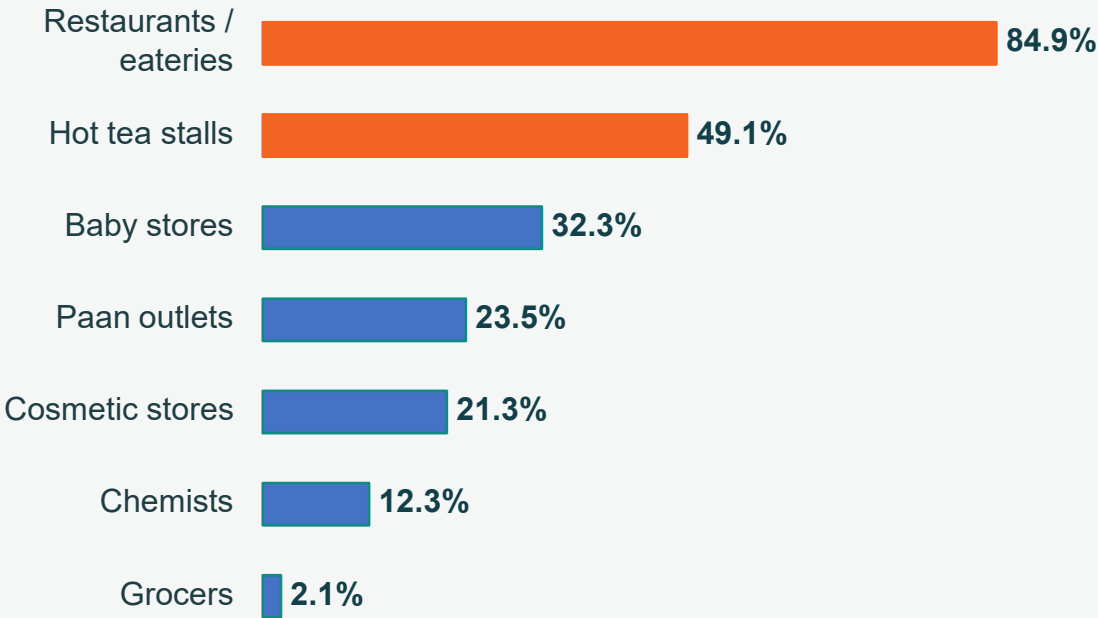
**SCALE OR REDESIGN**

**Day 30 proves execution. Day 60 proves conversion. Day 90 proves the route to scale.**

Source: NIQ India Breakthrough Innovation 2026; NIQ India FMCG Quarterly Snapshot Q2 2026. Benchmarks are external anchors, not prescriptive targets.

# The next launch opportunity may sit outside the legacy grocery map.

The fastest-growing outlets in the six-metro census are tied to immediate-consumption and specialist missions.



**How to use this evidence**

Occasion

Restaurants / eateries +84.9%; tea stalls +49.1%.

Scale

Grocers remain large, but grew only 2.1% in this comparison.

Targeting

Choose outlet archetypes that match the launch job-to-be-done.

Proof

Expand only after the archetype generates repeatable velocity.

Follow the shopper mission first. Then prove velocity before expanding reach.

Source: User-provided 2021–2024 census comparison; like-named outlet types only; classification changes mean trends are directional.

CONCLUSION

# Four numbers. Three decisions. One shelf-to-scale discipline.

The evidence converges on a simple model: prioritise precisely, correct early and scale only when the market confirms vitality.

67%

**Final decisions**

made in-store

87,437

**Additional outlets**

across six metros

4×

**Velocity benchmark**

top Indian innovators

7%

**National FMCG sales**

now via e-commerce

1

## PRIORITISE

Start with the local constraint and highest value-at-risk outlets.

2

## CORRECT EARLY

Separate launch execution from proposition performance.

3

## SCALE WITH PROOF

Expand when reach, velocity and reorder reinforce one another.

**Execution protects today's demand. Launch evidence earns tomorrow's right to scale.**

**Win the shelf. Learn faster. Scale what proves its vitality.**

# Thank You